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ABSTRACT

Under the Idaho state system for curriculum development in vocational education, Technical Committees made up solely of industry personnel are responsible for drawing up task lists for each program. This curriculum guide contains a series of 27 modules that comprise the Idaho Program Standards for Business Systems Specialist. It begins with a curriculum framework that provides the program area, program title, Idaho code number, Classification of Instructional Programs code number, major concepts/content, laboratory activities, special note(s), and instructional units. Like all programs developed under the Idaho state system for vocational education, it contains a task list. The task list for this program groups 332 occupational skills or tasks by the following 27 modules: demonstrate employability skills and habits; perform telephone related skills, math computations, keyboarding/typewriting activities, filing activities, business records activities, communication activities, and information processing activities; identify consumer economics terms and concepts; perform mail handling activities; demonstrate knowledge of reprographic activities; develop leadership skills; perform decision making activities; perform management and dictation/transcription activities; and perform legal specialty, medical specialty, information processing specialty, word processing specialty, insurance specialty, desktop publishing specialty, accounting specialty, telecommunications specialty, data processing specialty, networking specialty, records management, and computer graphics design principles activities. Each module contains performance objectives and enabling objectives for each task contained within the module. (YLB)

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Curriculum Guide for

BUSINESS SYSTEMS SPECIALIST

Invest in Success

IDAHO VTE VOCATIONAL TECHNICAL EDUCATION

STATE DIVISION OF VOCATIONAL EDUCATION

1991

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PROGRAM STANDARDS FOR

BUSINESS SYSTEMS SPECIALIST

JUNE 1991

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TABLE OF CONTENTS

Description		Page
Introduction		1
Acknowledgements		2
Curriculum Framework		3
Task List		7
Performance and Enabling Objectives		20
Module 1	Demonstrate Employability Skills and Habits	21
Module 2	Perform Telephone Related Skills	27
Module 3	Perform Math Computations	32
Module 4	Perform Keyboarding/Typewriting Activities	39
Module 5	Perform Filing Activities	50
Module 6	Perform Business Records Activities	55
Module 7	Perform Communication Activities	61
Module 8	Perform Information Processing Activities	68
Module 9	Identify Consumer Economics Terms and Concepts	78
Module 10	Perform Mail Handling Activities	81
Module 11	Demonstrate a Knowledge of Reprographic Activities	84
Module 12	Develop Leadership Skills	87
Module 13	Perform Decision Making Activities	91
Module 14	Perform Management Activities	98
Module 15	Perform Dictation/Transcription Activities	105
Module 16	Perform Legal Specialty Activities	108
Module 17	Perform Medical Specialty Activities	122
Module 18	Perform Information Processing Specialty Activities	156

Module 19 Perform Word Processing Specialty Activities..... 163

Module 20 Perform Insurance Specialty Activities..... 167

Module 21 Perform Desktop Publishing Specialty Activities..... 171

Module 22 Perform Accounting Specialty Activities..... 181

Module 23 Perform Telecommunications Specialty Activities..... 195

Module 24 Perform Data Processing Specialty Activities..... 200

Module 25 Perform Networking Specialty Activities..... 204

Module 26 Perform Records Management Specialty Activities..... 209

Module 27 Perform Computer Graphics Design Principles Activities..... 214

INTRODUCTION

The Idaho Vocational Curriculum Standards Project is a cooperative effort among secondary and postsecondary instructors and administrators to develop competency-based program standards for curriculum content for the Business Systems Specialist.

The Business System Specialist standards were developed utilizing the Statewide Task Force for Business Education and a variety of curriculum materials/examples provided by Dr. Eshelby.

The benefits to students and institutions derived from the development of these curriculum standards should be considerable. Articulation of students from secondary to postsecondary programs will be aided through a single set of curriculum standards. Local evaluation of programs and curricula can be accomplished using the standards as an objective measure. Institutions will be able to utilize the curriculum standards in a flexible manner to assure that vocational programs meet the needs of local business and industry.

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CURRICULUM FRAMEWORK

The Curriculum Framework provides a means for organizing the content of the occupational area by major subdivisions or "modules." Each module represents a set of skills grouped under a heading and based on one of the following design characteristics:

1. The type of equipment used;

2. The equipment being serviced;

3. The operational functions within the occupation;

4. The nature of the operation being performed;

5. A specialized area within the occupation.

The Curriculum Framework includes only the skills and knowledge directly applicable to student performance in the occupational area. Related subjects such as Mathematics and Communication Skills are not addressed in the curriculum standards because of the need for individualization of the student's academic or related studies based on counseling and guidance, and diagnostic test results. Academic or related requirements for the vocational student should be addressed through this framework and measured in a method appropriate for each secondary or postsecondary institution. Where appropriate, instructors are encouraged to utilize resources and personnel within the institution to improve or complement the instructional process.

CURRICULUM FRAMEWORK PROGRAM AREA: BUSINESS EDUCATION

IDAHO DIVISION OF VOCATIONAL EDUCATION

REVISION DATE: JULY, 1991 IDAHO CODE NUMBER: 07.0601

PROGRAM TITLE: BUSINESS SYSTEMS SPECIALIST

ADULT
SCHOOL CREDITS ___ COLLEGE CREDITS ___ VOCATIONAL CREDITS ___

APPLICABLE LEVEL(S): ___7-9 ___9-12 ___POSTSECONDARY ADULT
___POSTSECONDARY VOCATIONAL ___OTHER

I. MAJOR CONCEPTS/CONTENT: The purpose of this program is to prepare students for employment as business systems specialist, public information clerks, document specialists, office management trainees, information processing managers, information processing sales, representatives, phototypesetting managers, electronic workstation specialists, correspondence specialists, correspondence supervisors, telecommunication supervisors, software applications supervisors, office supervisors, supervisors of records and information clerks, office assistants, records supervisors, files supervisors, office systems managers, desktop publishing supervisors, administrative secretaries, senior administrative secretaries, executive office administrators, administrative assistants, or directors of information support systems. Students who also complete one or more of the specialty areas will be prepared for employment in a more specific business related occupation. This program is also designed to provide supplemental training for persons previously or currently employed in these occupations.

The content prepares individuals to assist management by expediting and facilitating the maintenance and production of correspondence and records; performing telephone functions; and planning. The content may include office functions in legal, medical, word processing, word/information, software application, insurance, and accounting areas. The content prepares individuals to use keyboards in a variety of activities, including recordkeeping duties, maintaining basic personnel information and providing support for management while continuing to perform routine secretarial duties.

II. LABORATORY ACTIVITIES: Laboratory activities are an integral part of this program and include the use of keyboarding/typewriting systems, calculators,

dictation/transcription equipment, computers, and peripheral equipment.

III. SPECIAL NOTE: Business Professionals of America is the appropriate vocational student organization for providing leadership experiences and for reinforcing specific vocational skills. When provided, these activities are considered an integral part of this instructional program.

The cooperative method of instruction is appropriate for this program. Whenever the cooperative method is offered, the following is required for each student: a training plan, signed by the student, teacher and employer, which includes instructional objectives and a list of on-the-job and in school learning experiences; a work station which reflects equipment, skills and tasks which are relevant to the occupation which the student has chosen as a career goal. The student must receive compensation for work performed.

Non-paid internships and on-the-job work experiences can also be used to supplement classroom instruction. However, instructors must be aware of fair-labor legal requirements related to these two options.

The typical length of this program for the average achieving student is 900 hours or the time required to receive a Business Systems Specialist certificate.

IV. INSTRUCTIONAL UNITS: After successfully completing this program, the student will be able to:

1. Demonstrate Employability Skills and Habits
2. Perform Telephone Related Skills
3. Perform Math Computations
4. Perform Keyboarding/Typewriting Activities
5. Perform Filing Activities
6. Perform Business Records Activities
7. Perform Communication Activities
8. Perform Information Processing Activities
9. Identify Consumer Economics Terms and Concepts
10. Perform Mail Handling Activities
11. Demonstrate a Knowledge of Reprographic Activities
12. Develop Leadership Skills
13. Perform Decision Making Activities
14. Perform Management Activities
15. Perform Dictation/Transcription Activities

Students specializing in one of the following areas, must complete the standards within that specialty area:

16. **Perform Legal Specialty Activities**
17. **Perform Medical Specialty Activities**
18. **Perform Information Processing Specialty Activities**
19. **Perform Word Processing Specialty Activities**
20. **Perform Insurance Specialty Activities**
21. **Perform Desktop Publishing Specialty Activities**
22. **Perform Accounting Specialty Activities**
23. **Perform Telecommunications Specialty Activities**
24. **Perform Data Processing Specialty Activities**
25. **Perform Networking Specialty Activities**
26. **Perform Records Management Specialty Activities**
27. **Perform Computer Graphics Design Principles Activities**

TASK LIST

The following task list is a set of occupational skills or "tasks" which are grouped by modules. Each task describes an occupational activity that, when performed, will result in a finished process or product. The nature of the finished process or product can vary, but should always allow an evaluation using the standards which address the operation, appearance, dimensions, or similar characteristics.

The tasks contained in each module represent the recommended minimal level of activity that should be required of any student seeking institutional credit for performing at an acceptable level of competency. The sequenced tasks reflect a progression from simple to complex. Curriculum standards unique to an institution's instructional program may be added to these standards with approval of the administration.

The capability for providing instructional experiences and practical application of the tasks contained in each module will determine the scope of the vocational-technical program. Primary considerations will obviously be the availability of equipment and the expertise of the instructional staff.

Individual records of student progress based on the task list should be developed or adapted by the vocational institution for use in recording the student's attainment of competency by task and module.

STUDENT PERFORMANCE STANDARDS EFFECTIVE DATE JULY, 1991

PROGRAM AREA: Business Education

PROGRAM TITLE: Business Systems Specialist

PROGRAM TASK LISTING

01.0 DEMONSTRATE EMPLOYABILITY SKILLS AND HABITS--The student will be able to:

- 01.01 Identify employment opportunities
- 01.02 Apply employment seeking skills
- 01.03 Interpret employment capabilities
- 01.04 Demonstrate appropriate work behavior
- 01.05 Maintain safe and healthy environment
- 01.06 Maintain business-like image
- 01.07 Maintain effective working relationships
- 01.08 Communicate effectively on the job
- 01.09 Adapt to change
- 01.10 Demonstrate a knowledge of business laws and principles
- 01.11 Develop appropriate grooming habits
- 01.12 Demonstrate a knowledge of human relations skills

02.0 PERFORM TELEPHONE RELATED SKILLS--The student will be able to:

- 02.01 Identify telephone systems and types of calls
- 02.02 Identify telephone services
- 02.03 Locate telephone numbers
- 02.04 Demonstrate techniques of answering a phone call
- 02.05 Demonstrate techniques of placing a phone call
- 02.06 Record messages
- 02.07 Demonstrate procedures for screening a call
- 02.08 Demonstrate procedures for transferring a call
- 02.09 Identify procedures for placing a conference call

03.0 PERFORM MATH COMPUTATIONS--The student will be able to:

- 03.01 Solve addition, subtraction, multiplication, and division problems manually
- 03.02 Solve addition, subtraction, multiplication, and division problems using a calculator
- 03.03 Solve problems involving percentages and discounts using a calculator
- 03.04 Solve problems involving comparison shopping using a calculator
- 03.05 Interpret charts, graphs and tables

03.06 Solve finance charge and annual percentage rate problems using a calculator
03.07 Determine elapsed time between two events, stated in seconds, minutes, hours, days, weeks, months, or years
03.08 Solve problems involving decimals and fractions
03.09 Determine whether sufficient, insufficient, or extraneous information is given for solving a problem
03.10 Solve problems involving perimeter or area of a region
03.11 Solve problems involving length, width or height
03.12 Solve problems involving capacity
03.13 Solve problems using metric units
03.14 Read and verify the totals on a print-out

04.0 PERFORM KEYBOARDING/TYPEWRITING ACTIVITIES--The student will be able to:

04.01 Demonstrate keyboarding/typewriting techniques
04.02 Identify operative parts of keyboarding equipment
04.03 Identify formatting principles
04.04 Demonstrate speed and accuracy in typing straight-copy material
04.05 Key/type business letters and envelopes
04.06 Key/type interoffice memoranda
04.07 Key/type tabulated information
04.08 Key/type a two-page letter
04.09 Key/type business letters containing special features, enumerated items and tabulated material requiring different sizes of stationery
04.10 Key/type a memorandum to multiple recipients and address interoffice envelopes
04.11 Key/type labels
04.12 Key/type a report using footnotes or endnotes, or parenthetical documentation
04.13 Key/type multi-copy preprinted business forms
04.14 Key/type a news release
04.15 Key/type minutes of a meeting
04.16 Key/type tables in ruled and boxed form
04.17 Key/type material from handwritten copy
04.18 Key/type a standardized document by merging selected paragraphs and variable information
04.19 Key/type from a rough draft copy containing proofreaders' marks
04.20 Key/type different sizes of documents
04.21 Perform keyboard functions using an integrated software package

05.0 PERFORM FILING ACTIVITIES--The student will be able to:

- 05.01 Index, code, sort, and store materials alphabetically
- 05.02 Identify types of filing supplies, equipment, and procedures
- 05.03 Index, code, sort, and store numerically
- 05.04 Index, code, sort, and file materials geographically
- 05.05 Index, code, sort, and file materials by subject
- 05.06 Retrieve materials from files
- 05.07 Cross-reference materials in the alphabetic, numeric, alpha-numeric, geographic, and subject filing systems
- 05.08 Search for lost materials in files
- 05.09 Keep classified or confidential file materials secure
- 05.10 Transfer and discard files

06.0 PERFORM BUSINESS RECORDS ACTIVITIES--The student will be able to:

- 06.01 Prepare checks and stubs
- 06.02 Endorse checks using special endorsements
- 06.03 Prepare a deposit slip and adjust checkbook
- 06.04 Prepare bank reconciliations
- 06.05 Prepare purchase requisitions
- 06.06 Prepare purchase orders
- 06.07 Prepare invoices
- 06.08 Prepare sales slips
- 06.09 Maintain petty cash records
- 06.10 Demonstrate a knowledge of accounting cycles

07.0 PERFORM COMMUNICATION ACTIVITIES--The student will be able to:

- 07.01 Follow oral and written instructions
- 07.02 Demonstrate appropriate telephone procedures for telecommunications
- 07.03 Compose business correspondence and related documents
- 07.04 Prepare, outline, and deliver a short oral presentation
- 07.05 Prepare visual material to support an oral presentation
- 07.06 Participate in group discussion as a member and as a leader
- 07.07 Obtain appropriate information from graphics, maps, or signs
- 07.08 Locate/record information from written resources, including current periodicals

07.09 Dictate using recording equipment
07.10 Annotate letters, reports, and/or news articles
07.11 Spell and define words, including business terms
07.12 Define terms associated with communications
07.13 Edit documents using proofreader's marks

08.0 PERFORM INFORMATION PROCESSING ACTIVITIES--The student will be able to:

08.01 Demonstrate knowledge of computer systems
08.02 Locate requested information on a computer printout
08.03 Identify applications of computers in business
08.04 Identify terms commonly used in information processing
08.05 Identify automated business systems, equipment components and electronic media
08.06 Edit letters and documents using automated equipment
08.07 Input, store, and output letters from handwritten or typed material on automated equipment
08.08 Input, store, and output dictated letters and documents on automated equipment
08.09 Input, store and output tabulated documents from handwritten or typed material on automated equipment
08.10 Revise stored documents and output them on automated equipment
08.11 Sequence and define the steps of an information processing cycle
08.12 Input numeric data
08.13 Use an office operations manual
08.14 Develop a flowchart
08.15 Perform "start-up" procedures on a computer system
08.16 Develop a component of an office operations manual
08.17 Perform computer activities using database
08.18 Perform computer activities using spreadsheets
08.19 Perform computer activities in communications
08.20 Perform computer activities with spreadsheets using graphics software
08.21 Perform computer activities using the graphic functions of a word processing program
08.22 Edit and verify printout information
08.23 Verify printout totals

09.0 IDENTIFY CONSUMER ECONOMICS TERMS AND CONCEPTS--The student will be able to:

- 09.01 Identify basic concepts of the free enterprise economic system
- 09.02 Identify basic types of sources of consumer credit
- 09.03 Identify elements of a contract
- 09.04 Identify advantages and disadvantages of consumer credit

10.0 PERFORM MAIL HANDLING ACTIVITIES-- The student will be able to:

- 10.01 Classify mail
- 10.02 Locate ZIP codes
- 10.03 Process mail
- 10.04 Select special mail services
- 10.05 Identify electronic mail services

11.0 DEMONSTRATE A KNOWLEDGE OF REPROGRAPHIC ACTIVITIES--The student will be able to:

- 11.01 Identify characteristics of reprographic methods
- 11.02 Determine best reprographic methods to use
- 11.03 Define terms used in reprographics
- 11.04 Identify characteristics of paper
- 11.05 Determine appropriate copyright applications

12.0 DEVELOP LEADERSHIP SKILLS--The student will be able to:

- 12.01 Prepare an agenda
- 12.02 Determine appropriate action in situations requiring application of business ethics
- 12.03 Conduct an orderly meeting
- 12.04 Greet and introduce individuals
- 12.05 Introduce a speaker
- 12.06 Demonstrate knowledge of professional organizations
- 12.07 Demonstrate ability to set priorities
- 12.08 Demonstrate ability to delegate responsibilities

13.0 PERFORM DECISION MAKING ACTIVITIES--The student will be able to:

- 13.01 Use techniques in business situations
- 13.02 Determine the proper priority of work
- 13.03 Prepare a day's schedule for an employer
- 13.04 Choose appropriate action in situations requiring application of business ethics
- 13.05 Choose appropriate action in situations requiring following a chain of command

13.06 Choose appropriate action in situations requiring effective time management
13.07 Select and delegate tasks (assign work to others)
13.08 Determine preventive actions for office communication problems
13.09 Select the best ways to handle confidential information
13.10 Identify the best way to provide constructive feedback on improper behavior
13.11 Identify options for solving personnel problems
13.12 Choose appropriate action in solving problems involving violation of business principles
13.13 Demonstrate appropriate office behavior
13.14 Select items for new employee orientation

14.0 PERFORM MANAGEMENT ACTIVITIES--The student will be able to:

14.01 Identify management styles
14.02 Prepare managerial reports about production, personnel, equipment, and operational costs
14.03 Set priorities
14.04 Develop procedures for efficient work flow
14.05 Conduct performance appraisals, set goals, and recommend training
14.06 Discuss elements of a general budget
14.07 Select appropriate action applying business management practices
14.08 Apply time management skills to office schedule
14.09 Develop short/long range plans including Equal Access/Equal Opportunity (EAEO) guidelines
14.10 Develop procedures for handling grievances
14.11 Evaluate job applicants based upon interviews
14.12 Recommend employees for promotion
14.13 Budget office expenses
14.14 Sketch layout of an office using principles of ergonomics
14.15 Select vendors from whom to purchase office supplies
14.16 Organize meetings/seminars
14.17 Prepare travel arrangements

15.0 PERFORM DICTATION/TRANSCRIPTION ACTIVITIES--The student will be able to:

15.01 Demonstrate techniques in machine dictation and transcription
15.02 Transcribe recorded dictation of business related documents into mailable form
15.03 Take notes and transcribe into mailable form

16.0 PERFORM LEGAL SPECIALTY ACTIVITIES--The student will be able to:

16.01 Select and complete legal documents
16.02 Schedule appointments and activities
16.03 Record legal office transactions
16.04 Demonstrate knowledge of legal terms
16.05 Locate and record information found in legal references
16.06 Transcribe from recorded legal dictation/proceedings
16.07 Prepare and maintain legal records
16.08 Identify the court in which legal documents should be filed

17.0 PERFORM MEDICAL SPECIALTY ACTIVITIES--The student will be able to:

17.01 Demonstrate knowledge of medical terms
17.02 Demonstrate knowledge of anatomy, physiology, body systems and associated common diseases/conditions
17.03 Schedule office appointment(s)
17.04 Schedule hospital admissions, out-patient surgery, and ancillary testing
17.05 Maintain physician's on-call schedule
17.06 Schedule medical staff appointments and activities
17.07 Process patients/visitors
17.08 Assist patient to complete registration form(s)
17.09 Assemble/compile/activate patient's medical record/chart
17.10 Maintain patient's medical record folder
17.11 Process out-of-office examination, test or treatment information
17.12 Prepare laboratory requisition
17.13 Prepare packages for shipping/mailing
17.14 Code surgical, diagnoses and procedures
17.15 Complete insurance claim form(s)
17.16 Inventory supplies and equipment
17.17 Order supplies and equipment
17.18 Verify receipt of supplies and equipment
17.19 Store medical equipment and supplies
17.20 Schedule custodial and maintenance services
17.21 Process incoming telephone calls
17.22 Process outgoing telephone calls
17.23 Process incoming mail
17.24 Prepare correspondence for mailing
17.25 Compose correspondence
17.26 Transcribe dictation
17.27 Transcribe histories, notes, clinical resumes and reports into medical records
17.28 Prepare agendas
17.29 Take and transcribe minutes of meetings

17.30 Type manuscripts
17.31 Compose abstracts of articles and reports
17.32 Establish cross-reference index
17.33 Maintain alphabetical, numerical, and subject filing system
17.34 Arrange conferences
17.35 Make travel arrangements and prepare itinerary
17.36 Enter information into computer terminal
17.37 Retrieve information from computer terminal
17.38 Duplicate material(s) on copying machine
17.39 Prepare medical record(s) for microfilming
17.40 Process patient charge slips
17.41 Record payments
17.42 Prepare itemized statements
17.43 Control petty cash fund
17.44 Reconcile cash count and receipts
17.45 Prepare bank deposits
17.46 Process overdue accounts
17.47 Process accounts payable invoices
17.48 Prepare medical records for court
17.49 Maintain patient master (card) index file
17.50 Maintain manual/automated disease indexes
17.51 Maintain manual/automated surgical operations indexes
17.52 Maintain physical/confidential security of medical records
17.53 Enter medical records information on computer
17.54 Establish medical record filing system
17.55 Develop a policy/procedures manual
17.56 Maintain policy/procedures manual
17.57 File alphabetically and numerically
17.58 Orient and train employees/students
17.59 Develop/coordinate personnel continuing education opportunities

18.0 PERFORM INFORMATION PROCESSING SPECIALTY ACTIVITIES--
The student will be able to:

18.01 Edit documents on automated equipment
18.02 Input, store, and output business documents, including scanners
18.03 Revise and output stored documents and output them using automated equipment
18.04 Demonstrate knowledge of word processing concepts and terms
18.05 Create business documents using spreadsheet, database, and graphics application software
18.06 Demonstrate knowledge of the advantages and disadvantages of integrated vs. dedicated software
18.07 Create and maintain a database
18.08 Compose, send, and retrieve electronic messages

19.0 PERFORM WORD PROCESSING SPECIALTY ACTIVITIES--The student will be able to:

- 19.01 Edit documents on automated equipment
- 19.02 Input, store, and output business documents including scanners
- 19.03 Revise and output stored documents using automated equipment
- 19.04 Demonstrate knowledge of word processing concepts and terms
- 19.05 Create business documents using word processing procedures
- 19.06 Demonstrate knowledge of various word processing software
- 19.07 Compose, send, and retrieve electronic messages

20.0 PERFORM INSURANCE SPECIALTY ACTIVITIES--The student will be able to:

- 20.01 Select and complete insurance forms
- 20.02 Demonstrate knowledge of insurance terms
- 20.03 Locate and record information found in insurance manuals
- 20.04 Prepare and maintain insurance records
- 20.05 Process insurance claims
- 20.06 Prepare insurance billing documents
- 20.07 Complete insurance documents on automated equipment

21.0 PERFORM DESKTOP PUBLISHING ACTIVITIES--The student will be able to:

- 21.01 Define desktop publishing
- 21.02 Use the windows environment
- 21.03 Use the mouse in the windows environment
- 21.04 Demonstrate knowledge of desktop publishing terms
- 21.05 Demonstrate knowledge of communications software/hardware
- 21.06 Create documents using intergrated software
- 21.07 Demonstrate knowledge of the basics of the design process in publishing
- 21.08 Analyze previous and current industry techniques in document design
- 21.09 Determine effective strategies for publication design
- 21.10 Demonstrate knowledge of the principles of graphic design and layout
- 21.11 Identify equipment and materials used in graphic design and layout
- 21.12 Create visuals using desktop graphics software
- 21.13 Utilize creative techniques to design simple publications

templates

21.15 Create and apply custom colors

21.16 Setup and apply type styles, paragraph formats, and tabs/indents

21.17 Demonstrate knowledge of scanning and scanning terminology

21.18 Integrate scanned images

21.19 Use desktop publishing image control to manipulate graphic images

21.20 Create multiple-page documents

21.21 Integrate word processing documents into desktop publishing

21.22 Bring together all word processing, TIF, PNT, EPS, and CDR files into a finished publication from creation to publication

22.0 PERFORM ACCOUNTING SPECIALTY ACTIVITIES--The student will be able to:

22.01 Prepare payroll records

22.02 Record transactions in special journals

22.03 Post journal entries to subsidiary ledgers

22.04 Record transactions in general journal

22.05 Post entries from a general journal to a general ledger

22.06 Prepare work sheet

22.07 Prepare income statement

22.08 Prepare statement of owner's equity

22.09 Prepare balance sheets

22.10 Journalize and post adjusting entries

22.11 Journalize and post closing entries

22.12 Prepare post-closing trial balance

22.13 Prepare data for a general budget

22.14 Interpret financial statements

22.15 Perform accounting functions using an automated system

22.16 Perform accounting functions using an automated spreadsheet system

23.0 PERFORM TELECOMMUNICATIONS SPECIALTY ACTIVITIES--The student will be able to:

23.01 Define telecommunications and understand the history of telecommunications

23.02 Demonstrate knowledge of basic telecommunication concepts in relation to technology, applications, and system components

23.03 Categorize terminal equipment according the four applications of voice, data, image, and text and demonstrate knowledge of their capabilities.

23.04 Compose and send electronic messages using appropriate format and composition
23.05 Discuss impact of local and wide area networks on the delivery of information
23.06 Identify business concerns such as procurement, accounting, security, and other concerns.
23.07 Understand the basic function of the telecommunications regulatory/policy process.
23.08 Identify and understand telecommunications applications and services.
23.09 Understand the human impact of telecommunications.

24.0 PERFORM DATA PROCESSING SPECIALTY ACTIVITIES--The student will be able to:

24.01 Demonstrate knowledge of data processing terms
24.02 Identify equipment associated with processing of data
24.03 Demonstrate knowledge of business-computer languages
24.04 Demonstrate knowledge of operating systems/languages
24.05 Prepare flow charts for business applications
24.06 Demonstrate trouble-shooting and diagnostic procedures

25.0 NETWORKING SPECIALTY ACTIVITIES--The student will be able to:

25.01 Introduce students to the basic networking concepts and terms.
25.02 Provide a definition of advantages and disadvantages of local area networks
25.03 Provide comparisons of topologies and protocols available for local area networks
25.04 Install local area network hardware
25.05 Generate and maintain the operating system
25.06 Set up file servers, user specifications, and printers
25.07 Provide system administrator managements with day-to-day maintenance
25.08 Identify standards and their importance and implications
25.09 Introduce bridges and gateways
25.10 Install application software on a network

26.0 PERFORM RECORDS MANAGEMENT ACTIVITIES--The student will be able to:

- 26.01 File records correctly using alphabetic, numeric, subject, geographic, and chronological methods as learned in the filing unit
- 26.02 Learn terminology as it applies to records management
- 26.03 Describe methods of protecting vital records
- 26.04 Describe appropriate actions for the retention and disposal of records
- 26.05 Compare characteristics of centralized and decentralized filing systems
- 26.06 Classify records into vital, useful, and nonessential categories
- 26.07 Compare manual with electrical/automated filing systems
- 26.08 Describe security procedures

27.0 PERFORM COMPUTER GRAPHICS DESIGN PRINCIPLES ACTIVITIES--The student will be able to:

- 27.01 Demonstrate knowledge of the basics of the design process in graphics
- 27.02 Analyze previous and current industry techniques in graphic design
- 27.03 Determine effective strategies for graphic design
- 27.04 Utilize creative techniques to design simple graphic elements

PERFORMANCE AND ENABLING OBJECTIVES

Each curriculum standard (Task, Performance Objective, Enabling Objectives) utilizes a competency-based approach to student evaluation based on objective, measurable criteria. Each task is accompanied by a performance objective and a set of enabling objectives which describe the conditions, performance, evaluation criteria, and learning outcomes required for completion of the task by the student. In the performance objective, the conditions address the following:

1. Tools, equipment, and materials required for the activity;

2. Specifications and critical characteristics required for the finished product or process.

Each performance objective is followed by a set of enabling objectives. These objectives identify necessary competencies that will enable the student to master the performance objective. Enabling objectives are expressed in concise statements so their intent is clear to the instructor and the student. The instructor should develop appropriate instructional activities, for the student to master. Each set of enabling objectives generally is directed toward technical terminology, use equipment, procedures or techniques associated with task. Instructional styles or methodologies are not addressed because of the variety of teaching styles.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 1 - DEMONSTRATE EMPLOYABILITY SKILLS AND HABITS

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 1 - DEMONSTRATE EMPLOYABILITY SKILLS AND HABITS

01.0 DEMONSTRATE EMPLOYABILITY SKILLS AND HABITS--The student will be able to:

- 01.01 Identify employment opportunities
- 01.02 Apply employment seeking skills
- 01.03 Interpret employment capabilities
- 01.04 Demonstrate appropriate work behavior
- 01.05 Maintain safe and healthy environment
- 01.06 Maintain business-like image
- 01.07 Maintain effective working relationships
- 01.08 Communicate effectively on the job
- 01.09 Adapt to change
- 01.10 Demonstrate a knowledge of business laws and principles
- 01.11 Develop appropriate grooming habits
- 01.12 Demonstrate a knowledge of human relations skills

MODULE 1 - DEMONSTRATE EMPLOYABILITY SKILLS AND HABITS

01.01 TASK: Identify employment opportunities

PERFORMANCE OBJECTIVE: Given employment information resources, the student will obtain and compile the information needed to seek a job as listed on a teacher-provided check list.

ENABLING OBJECTIVES:

1. Identify the requirements for a job.
2. Investigate educational opportunities.
3. Investigate occupational opportunities.
4. Locate resources for finding employment.
5. Confer with prospective employers.
6. Identify job trends.

01.02 TASK: Apply employment seeking skills

PERFORMANCE OBJECTIVE: Given appropriate information, the student will locate a job opportunity, prepare and take an interview for it, complete the required tests, forms and applications, and evaluate response to the job opportunity to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Locate a job opening.
2. Complete a resume.
3. Prepare for an interview.

4. Participate in an interview.
5. Complete tests required.
6. Complete forms required.
7. Complete an application letter.
8. Complete a follow-up letter.
9. Complete an acceptance letter.
10. Evaluate a job offer.
11. Evaluate a job rejection.

01.03 TASK: Interpret employment capabilities

PERFORMANCE OBJECTIVE: Given an assignment to explain capabilities for employment, the student will demonstrate how to match skills and experience to a job to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Match interest to job area.
2. Match aptitudes to job area.
3. Verify abilities.
4. Identify immediate work goal.
5. Develop career plan.

01.04 TASK: Demonstrate appropriate work behavior

PERFORMANCE OBJECTIVE: Given the responsibility of an employee in a new job, the student will demonstrate knowledge of appropriate behavior in the work place to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Exhibit dependability.
2. Demonstrate punctuality.
3. Follow rules and regulations.
4. Explain the consequences of dishonesty.
5. Complete assignments accurately and on time.
6. Control your emotions.
7. Take responsibility for your decisions and actions.
8. Take pride in your work and be a loyal worker.
9. Learn to handle pressures and tensions.
10. Demonstrate ability to set priorities.
11. Demonstrate problem-solving skills.

01.05 TASK: Maintain safe and healthy environment

PERFORMANCE OBJECTIVE: Given the responsibility of an employee in a new job, the student will demonstrate knowledge of safety in the work place as listed on a teacher-provided check list.

ENABLING OBJECTIVES:

1. Comply with safety and health rules.
2. Select correct tools and equipment.
3. Utilize equipment correctly.
4. Use appropriate action during emergencies.
5. Maintain clean and orderly work area.

01.06 TASK: Maintain business-like image

PERFORMANCE OBJECTIVE: Given a responsibility to perform the duties of a new job, the student will demonstrate a knowledge of the actions and behaviors which will project a business-like image based on teacher-provided criteria.

ENABLING OBJECTIVES:

1. Participate in company or agency orientation.
2. Demonstrate knowledge of company or agency products and services.
3. Exhibit positive behavior.
4. Read current job-related publications.
5. Support and promote employer's company image and purpose.
6. Maintain appearance to comply with company standards.

01.07 TASK: Maintain effective working relationships

PERFORMANCE OBJECTIVE: Given the responsibility to perform the duties of a new job, the student will demonstrate a knowledge of how to successfully work with others based on instructor-provided criteria.

ENABLING OBJECTIVES:

1. Work productively with others.
2. Show empathy, respect and support for others.
3. Assist others when necessary.
4. Recognize problems and work toward their solution.
5. Minimize the occurrence of problems.
6. Channel emotional reactions in positive ways.

01.08 TASK: Communicate effectively on the job

PERFORMANCE OBJECTIVE: Given the responsibility to perform the duties of a new job, the student will demonstrate a knowledge of how to successfully communicate with others as listed on a teacher-provided check list.

ENABLING OBJECTIVES:

1. Read and comprehend written communications and information.

2. Use correct grammar.
3. Speak effectively with others.
4. Use job-related terminology.
5. Use proper listening techniques.
6. Write legibly.
7. Use telephone etiquette.
8. Follow written and oral directions.
9. Use questioning techniques for understanding.
10. Locate information to accomplish task.
11. Prepare written communication.
12. Utilize keyboarding skills.
13. Utilize computer skills.

01.09 TASK: Adapt to change

PERFORMANCE OBJECTIVE: Given the responsibility to perform the duties of a new job, the student will demonstrate a knowledge of how to adapt to change by listing the pros and cons associated with the proposed change.

ENABLING OBJECTIVES:

1. Recognize the need to change.
2. Demonstrate a willingness to learn.
3. Demonstrate flexibility.
4. Participate in continuing education.
5. Seek challenge in the work place.
6. Adjust goals and plans when necessary.

01.10 TASK: Demonstrate a knowledge of business laws and principles

PERFORMANCE OBJECTIVE: Given the responsibility to perform the duties of a new job, the student will demonstrate a knowledge of the role of that business, its employees, and the free enterprise system based on a teacher-provided check list.

ENABLING OBJECTIVES:

1. Explain the role of business in the free enterprise system.
2. List the responsibilities of employees.
3. Identify the responsibilities of managers and employers.
4. Discuss the opportunities for business ownership or management.
5. Describe the planning required to start a business.
6. Discuss the importance of business meetings.

01.11 TASK: Develop appropriate grooming habits

PERFORMANCE OBJECTIVE: Given the responsibility of an employee in a new job, the student will demonstrate knowledge of acceptable grooming habits based on a teacher-provided check list.

ENABLING OBJECTIVES:

1. Describe the elements of good personal hygiene.
2. Demonstrate appropriate and inappropriate attire for various business occupations.
3. Discuss hair styles and impressions they communicate.
4. Identify appropriate colors for clothing and accessories for skin tone color and personal taste.

01.12 TASK: Demonstrate a knowledge of human relations skills

PERFORMANCE OBJECTIVE: Given the responsibility to perform the duties of a new job, the student will demonstrate a knowledge of acceptable behavior when interacting with others to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate and contrast the differences between assertive, passive and aggressive behavior.
2. Demonstrate appropriate responses to others who are demonstrating assertive, passive, and aggressive behavior.
3. Use teamwork and cooperation in business situations.
4. Discuss the importance of positive attitudes in creating a positive working atmosphere.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 2 - PERFORM TELEPHONE RELATED SKILLS

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 2 - PERFORM TELEPHONE RELATED SKILLS

02.0 PERFORM TELEPHONE RELATED SKILLS--The student will be able to:

02.01 Identify telephone services and types of calls
02.02 Identify telephone systems
02.03 Locate telephone numbers
02.04 Demonstrate techniques of answering a phone call
02.05 Demonstrate techniques of placing a phone call
02.06 Record messages
02.07 Demonstrate procedures for screening a phone call
02.08 Demonstrate procedures for transferring a phone call
02.09 Identify procedures for placing a conference call

MODULE 2 - PERFORM TELEPHONE RELATED SKILLS

02.01 TASK: Identify telephone services and types of calls

PERFORMANCE OBJECTIVE: Given a list and description of 10 telephone services and types of calls, the student will match the terms with the descriptions. At least 8 of the 10 terms must be matched correctly.

ENABLING OBJECTIVE:

1. Students will be provided a list of telephone services and types of calls including but not limited to the following: area code, collect, conference, credit card, directory assistance, WATS, etc.
2. Students will choose the proper telephone service for making a long distance phone call using role playing activities.

02.02 TASK: Identify telephone systems

PERFORMANCE OBJECTIVE: Given 10 telephone situations the student will identify which telephone system to use. Students will match at least 8 of the 10 systems correctly.

ENABLING OBJECTIVES:

1. Identify telecommunications systems.
2. Participate in a field trip or view a video showing telecommunications equipment.

3. Select a correct telephone system from a multiple choice listing.
4. Use electronic mail in a classroom setting.

02.03 TASK: Locate telephone numbers

PERFORMANCE OBJECTIVE: Given a variety of telephone directories and a list of 25 names including government, business and personal names, the student will locate and record the correct telephone numbers. At least 24 of the 25 phone numbers must be recorded correctly.

ENABLING OBJECTIVES:

1. Student will have used a local telephone directory, a regional telephone directory, and a WATS directory.
2. Students will select the correct telephone directory for the number needed.
3. Students will locate numbers using yellow pages, white pages, green and blue special directories when needed.

02.04 TASK: Demonstrate techniques of answering a phone call

PERFORMANCE OBJECTIVE: Given a telephone or business trainer and a situation requiring an incoming local call, the student will answer the telephone. All items must receive an acceptable rating.

ENABLING OBJECTIVES:

1. Role play answering the phone using the following skills:
   a. Answer promptly before the third ring.
   b. Identify business and self clearly.
   c. Write down caller's name.
   d. Be attentive to details of the conversation.
   e. Transfer call if needed.
   f. Volunteer helpful information when possible.
   g. Distinguish between helpful and harmful information.
   h. Make inquiries tactfully.
   i. Take message when needed.
   j. Complete message form correctly.
   k. Verify spelling and special details of call.
   l. Close call politely.

02.05 TASK: Demonstrate techniques of placing a phone call

PERFORMANCE OBJECTIVE: Given a telephone or business trainer and a situation requiring an outgoing local call, the student will place the telephone call. All items must be completed with an acceptable rating.

ENABLING OBJECTIVES:

1. Prepare information for call.
2. Verify number to be dialed.
3. Carefully dial number.
4. Identify self.
5. Ask politely if this is a convenient time for receiver to take call.
6. Give information clearly.
7. Confirm information for mutual understanding.
8. Express appreciation.
9. Close call politely.
10. Replace receiver gently.

2.06 TASK: Record messages

PERFORMANCE OBJECTIVE: Given a telephone script, the student will complete a telephone message form correctly. All information will be either neatly typed or handwritten without error.

ENABLING OBJECTIVES:

1. Use "While You Were Out" message forms that help take complete messages.
2. Have pen, pencil, or typewriter close to phone.
3. Complete message form legibly.
4. Complete time and date including a.m. or p.m.
5. Correctly spell caller's name, title, and company name.
6. Select correct response for caller to make from choices: "telephoned," "urgent," " please call," etc.
7. Complete phone number with area code and extension.
8. Complete message portion with enough detail for caller to know nature of call.
9. Deliver message form to recipient's desk or mail box.

2.07 TASK: Demonstrate procedures for screening a phone call

PERFORMANCE OBJECTIVE: In a role playing situation, the student will screen a call using tact and good judgment. All items must be completed with an acceptable rating.

ENABLING OBJECTIVES:

1. Define tact.
2. Use tact to seek identity of caller.
3. Answer caller's questions or refer them to someone else in company who can help them.
4. Take a clear, accurate, professional message of the call.
5. Transfer call when appropriate.

02.08 TASK: Demonstrate procedures for transferring a phone call

PERFORMANCE OBJECTIVE: Given telephone simulation activities, the student will receive telephone calls, determine nature of calls, and transfer calls to the proper person. All items must be rated acceptable using a checklist.

ENABLING OBJECTIVE:

1. Listen to demonstration of proper way to determine nature of calls and transfer them to proper person.
2. Study organizational charts.
3. Participate in discussion/demonstration of proper methods for handling difficult callers.
3. Participate in telephone simulation activity for receiving, transferring and/or terminating calls.

02.09 TASK: Identify procedures for placing a conference call

PERFORMANCE OBJECTIVES: Given business situations, the student will identify the proper method for making conference calls. All items must be rated acceptable using a checklist.

ENABLING OBJECTIVES:

1. Identify need for conference calls.
2. Participate in class discussion of conference calls.
3. Role play placing a conference call to several areas, locating required numbers, and providing information to operator.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 3 - PERFORM MATH COMPUTATIONS

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 3 - PERFORM MATH COMPUTATIONS

03.0 PERFORM MATH COMPUTATIONS--The student will be able to:

- 03.01 Solve addition, subtraction, multiplication, and division problems manually
- 03.02 Solve addition, subtraction, multiplication, and division problems using a calculator
- 03.03 Solve problems involving percentages and discounts using a calculator
- 03.04 Solve problems involving comparison shopping using a calculator
- 03.05 Interpret charts, graphs and tables
- 03.06 Solve finance charge and annual percentage rate problems using a calculator
- 03.07 Determine elapsed time between two events, stated in seconds, minutes, hours, days, weeks, months, or years
- 03.08 Solve problems involving decimals and fractions
- 03.09 Determine whether sufficient, insufficient, or extraneous information is given for solving a problem
- 03.10 Solve problems involving perimeter or area if a rectangular region
- 03.11 Solve problems involving length, width or height
- 03.12 Solve problems involving capacity
- 03.13 Solve problems using metric units
- 03.14 Read and verify the totals on a print-out

MODULE 3 - PERFORM MATH COMPUTATIONS

03.01 TASK: Solve addition, subtraction, multiplication and division problems manually

PERFORMANCE OBJECTIVE: Using pencil, paper and a set problems involving real numbers, the student will solve math problems involving addition, subtraction, multiplication, division and exponentiation of a combination of these operations with a 70% accuracy.

ENABLING OBJECTIVES:

1. List the proper order of operations for computations.
2. Convert fractions to real numbers.
3. Solve the given problems.

03.02 **TASK:** Solve addition, subtraction, multiplication and division problems using a calculator

PERFORMANCE OBJECTIVE: Given a set of problems involving real numbers and an electronic calculating device, the student will solve problems involving addition, subtraction, multiplication, division or exponentiation or a combination of these operations with a 70% accuracy.

ENABLING OBJECTIVES:

1. Identify the functions of a calculator.
2. Demonstrate proper fingering on a 10-key calculator.
3. Give the order of operations in computations.
4. Solve problems involving addition, subtraction multiplication, division and exponentiation using a calculator.
5. Interpret scientific notation.
6. Use estimation to recognize when errors have been made.

03.03 **TASK:** Solve problems involving percentages and discounts using a calculator

PERFORMANCE OBJECTIVE: Given a percentage, the student will be able to convert the percentage to a real number and use the number to calculate the percentage of a given number with 70% accuracy.

ENABLING OBJECTIVES:

1. Convert percents to real numbers.
2. Solve problems using percents.
3. Determine the original price and the resulting price after a percentage discount is given.

03.04 **TASK:** Solve problems involving comparison shopping using a calculator

PERFORMANCE OBJECTIVE: Given a unit of measure and the price, the student will be able to determine the price of each unit, then compare unit prices between two objects and determine the best value.

ENABLING OBJECTIVES:

1. Determine the price of each unit of a given product.
2. Compare the price of each unit with like units of a different product.

03.05 **TASK:** Interpret charts, graphs and tables

PERFORMANCE OBJECTIVE: Given charts, graphs, tables or statistical data, student will be able to interpret them

and extract information from them; or given data the student will be able to graphically represent it.

ENABLING OBJECTIVES:

1. Determine the best way to graphically represent data: Pie chart, line graph or bar graph.
2. Interpret the data shown graphically by telling where data changes, what trends are shown or what portions of the pie chart represent each section.

03.06 TASK: Solve finance charge and annual percentage rate problems using a calculator

PERFORMANCE OBJECTIVE: Given the parameters of a credit problem and a formula, the student will identify the principle, interest rate, total interest costs and the total cost of credit or determine the balance of an investment earning interest over a given period of time.

ENABLING OBJECTIVES:

1. Convert interest rate to a decimal number.
2. Utilize a formula or built-in calculator functions to determine total interest charged on a loan.
3. Determine the total cost of a loan including interest charged and principle borrowed.
4. Utilize built in functions on a calculator to determine interest charged on a loan.
5. Use a formula or built-in calculator functions to determine the growth of an investment earning interest.

03.07 TASK: Determine elapsed time between two events, stated in seconds, minutes, hours, days, weeks, months or years

PERFORMANCE OBJECTIVE: Given the times at which two events occurred, the student will determine the time elapsed between them with 70% accuracy.

ENABLING OBJECTIVES:

1. Convert years to months, weeks and days.
2. Convert months to weeks and days.
3. Convert weeks to days.
4. Convert days to hours and minutes.
5. Convert hours to minutes and seconds.
6. Determine which time increment in which to work problem.
7. After converting to like time increments, determine the time interval between the two events.

03.08 TASK: Solve problems involving decimals and fractions

PERFORMANCE OBJECTIVE: Given a problem involving decimals or fractions, the student will solve the problem with 80% accuracy.

ENABLING OBJECTIVES:

1. Determine the place value of a decimal problem.
2. Use a calculator to solve problems involving decimals.
3. Estimate the answer to determine calculator's accuracy.
4. Convert fractions to real, decimal numbers.
5. Solve problem with converted fraction.
6. Put parts of a fractions problem in the same terms (Use common denominator if necessary.)
7. Solve the problem in fraction form.

03.09 TASK: Determine whether sufficient, insufficient or extraneous information is given for solving a problem

PERFORMANCE OBJECTIVE: Given a problem with several variables, the student will extract useful information for solving the problem and disregard information that is not necessary. If insufficient information is given, student will so state.

ENABLING OBJECTIVES:

1. Make a table showing variables necessary to solve problem.
2. Assign the given values to chosen variables.
3. Determine if some variables have no value.
4. Solve problem if possible.
5. Disregard extraneous information.

03.10 TASK: Solve problems involving perimeter or area of a region

PERFORMANCE OBJECTIVE: Given any circle or polygon and the appropriate formula, the student will determine the area and/or perimeter of the figure and label according to the appropriate unit of measure with 70% accuracy.

ENABLING OBJECTIVES:

1. Determine the shape of the polygon or circle.
2. Determine the measurements and units given.
3. Apply the appropriate formula to find area.
4. Label the area with appropriate square units of measure.
5. Apply the appropriate formula to find perimeter.

6. Label the perimeter with appropriate units of measure.

03.11 TASK: Solve problems involving length, width or height

PERFORMANCE OBJECTIVE: Given the length, width and height of an object, a student will determine the area of any planar surface of the object.

ENABLING OBJECTIVES:

1. Determine which surface(s) on which to figure the area.
2. Determine the units of measure.
3. Figure the area of the desired surface and label with appropriate square units of measure.

03.12 TASK: Solve problems involving capacity

PERFORMANCE OBJECTIVE: Given a solid object of cubical or cylindrical shape and a formula to find volume, the student will determine the volume of the object.

ENABLING OBJECTIVES:

1. Determine the measurements necessary for obtaining volume.
2. Determine the units of measure.
3. Use a calculator, if necessary, to find the volume.
4. Label the answer in appropriate cubic units of measure.

03.13 TASK: Solve problems using metric units

PERFORMANCE OBJECTIVE: Given English or metric measurements and conversion formulas, the student will convert the measurements to appropriate metric or English units.

ENABLING OBJECTIVES:

1. Classify the units of measure as weight, length or volume.
2. Convert the measurements using appropriate conversion formulas and a calculator, if necessary.

03.14 TASK: Read and verify totals on a print-out

PERFORMANCE OBJECTIVE: Given a computer print-out of a program, the student will us a calculator to determine the validity of the output.

ENABLING OBJECTIVES:

1. Determine the initial data values of program.

2. Read program and make estimates of output.
3. Verify the output, using a calculator, if necessary.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 4 - PERFORM KEYBOARDING/TYPEWRITING ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 4 - PERFORM KEYBOARDING/TYPEWRITING ACTIVITIES

04.0 PERFORM KEYBOARDING/TYPEWRITING ACTIVITIES--The student will be able to:

- 04.01 Demonstrate keyboarding/typewriting techniques
- 04.02 Identify operative parts of keyboarding equipment
- 04.03 Identify formatting principles
- 04.04 Demonstrate speed and accuracy in typing straight-copy material
- 04.05 Key/type business letters and envelopes
- 04.06 Key/type interoffice memoranda
- 04.07 Key/type tabulated information
- 04.08 Key/type a two-page letter
- 04.09 Key/type business letters containing special feature, enumerated items and tabulated material requiring different sizes of stationery
- 04.10 Key/type a memorandum to multiple recipients and address interoffice envelopes
- 04.11 Key/type labels
- 04.12 Key/type a report using footnotes or endnotes, or parenthetical documentation
- 04.13 Key/type multi-copy printed business forms
- 04.14 Key/type a news release
- 04.15 Key/type minutes of a meeting
- 04.16 Key/type tables in ruled and boxed forms
- 04.17 Key/type material from handwritten copy
- 04.18 Key/type a standardized document by merging selected paragraphs and variable information
- 04.19 Key/type from a rough draft copy containing proofreader's marks
- 04.20 Key/type different sizes of documents
- 04.21 Perform keyboard functions using an integrated software package

MODULE 4 - PERFORM KEYBOARDING/TYPEWRITING ACTIVITIES

04.01 TASK: Demonstrate keyboarding/typewriting techniques

PERFORMANCE OBJECTIVE: Given a technique checklist identifying the specific techniques and the necessary materials to copy, the student will demonstrate correct keyboarding/typewriting techniques. A checklist will be used to rate performance. All techniques must receive an acceptable rating.

ENABLING OBJECTIVES:

1. Demonstrate efficient space-bar operation.
2. Demonstrate proper shift-key control.
3. Demonstrate correct carriage return without hesitation.
4. Demonstrate steady, uninterrupted typing.
5. Demonstrate correct position at the typewriter.
6. Keep eyes on copy.

04.02 TASK: Identify operative parts of keyboarding equipment

PERFORMANCE OBJECTIVE: Given a list of all operative parts of a typewriter and a list of all operations, the student will locate and identify the correct part to match the correct operation. All items must be matched correctly.

ENABLING OBJECTIVES:

1. Identify margin release.
2. Identify paper release.
3. Identify line-space regulator
4. Identify tabulator.
5. Identify variable line space.
6. Identify space bar.
7. Identify alignment ruler.
8. Identify ribbon reverse.
9. Identify paper guide.
10. Identify margin set--right.
11. Identify right cylinder knob.
12. Identify paper bail and bail scale.
13. Identify carriage return.
14. Identify ratchet release
15. Identify point indicator.

04.03 TASK: Identify formatting principles

PERFORMANCE OBJECTIVE: Given a multiple-choice test on the formatting principles the student will select the word or phrase that best completes the statement and write the correct letter in the answer column at the left. At least 90 percent must be correct.

ENABLING OBJECTIVES:

1. Identify correct format for business letters with attention lines, subject lines, display lines, and indented paragraphs.
2. Identify correct format for business reports, news releases, magazine articles, and book manuscripts.
3. Identify correct format for open tables, ruled tables, boxed tables, and tables with braced headings.

04.04 TASK: Demonstrate speed and accuracy in typing straight-copy material

PERFORMANCE OBJECTIVE: Given a straight-copy 5-minute timed writing, the student must type at least 25 gross words per minute with no more than 5 errors.

ENABLING OBJECTIVES:

1. Type a 2 minute warm-up drill.
2. Type 5 uninterrupted minutes on straight-copy.
3. Type at least 25 gross words per minute with no more than 5 errors.

04.05 TASK: Key/type business letters and envelopes

PERFORMANCE OBJECTIVE: Given two rough draft copies of business letters of approximately 100 words each, two envelopes, required supplies, a dictionary, and instructions for the format to be used, the student will key/type two mailable letters and envelopes within 30 minutes.

ENABLING OBJECTIVES:

1. Select letter styles from block, modified block, AMS.
2. Set side margin of 1 1/4.
3. Place dateline down 2 1/2.
4. Select either open or mixed punctuation.
5. Single space paragraph; double space between them.
6. If special notations are included:
   a. Place attention line in inside address in all caps
   b. Place subject DS after salutation
   c. Place enclosure DS after reference initials
   d. Place copy notation DS after enclosure
   e. Place PS DS after the copy notation

04.06 TASK: Key/Type interoffice memoranda

PERFORMANCE OBJECTIVE: Given rough-draft copies of two memoranda necessary supplies, and instructions on the format to be used, the student will key the memoranda in mailable form--One on plain paper; one on a memo form. All errors must be corrected. Memos are to be typed within 30 minutes.

ENABLING OBJECTIVES:

Memorandum typed on plain paper
1. Review formats.

2. Set margins 1 1/4" both left and right; 1" top margin.
3. Set tab for 2 spaces past the longest GUIDE word.
4. Use block format.
5. Type MEMORANDUM on line 7 in all caps. MEMORANDUM may be positioned at left margin, centered, or flush right.
6. Type GUIDE words using either single or double spacing.
7. Double/triple space after memo heading.
8. Single space body of memo, double space between paragraphs.
9. Place reference initials at left margin DS below body.

Memorandum typed on printed memo form

1. Review formats.
2. Set left margin two spaces after the longest guide word; set the right margin equal to the left margin.
3. Set a tab two spaces after the longest guide word.
4. Align typed information with bottom of each guide word.
5. Double/triple space after memo heading.
6. Single space body of memo, double space between paragraphs.
7. Place reference initials at left margin DS below body.

04.07 TASK: Key/type tabulated information

PERFORMANCE OBJECTIVE: Given copies of two 3-column tables, one arranged and one semi-arranged, with 5 items in each column, and columnar headings, and necessary supplies, the student will key/type both of the 3-column tables in mailable form within 40 minutes. All activities on the checklist must receive acceptable ratings.

ENABLING OBJECTIVES:

1. Center problems vertically and horizontally.
2. Quad/Triple space after heading.
3. Capitalize heading.
4. Use initial caps for subheading and columnar heading.
5. Center and underline columnar heading over columns.

04.08 TASK: Key/type a two-page letter

PERFORMANCE OBJECTIVE: Given a copy of a 2-page rough draft letter, instructions, necessary stationery and supplies, access to a dictionary or a word-division manual, the student will key/type a 2-page letter in the

format specified, making one carbon copy and addressing an envelope. All errors must be corrected. This task must be completed within 30 minutes.
ENABLING OBJECTIVES:

1. Set side margins for a two-page letter at 1 inch.
2. Select appropriate letter style. Choose from block, modified block or AMS.
3. Assemble carbon pack.
4. Use either spread or block second-page heading.
5. Use open or mixed punctuation.
6. Correct all errors on original and carbon.
7. Observe 1" bottom margin on first page.
8. Follow correct widow/orphan rule.
9. Address envelope using OCR format.

04.09 TASK: Key/type business letters containing special features, enumerated items and tabulated material requiring different sizes of stationery

PERFORMANCE OBJECTIVE: Given copies of four rough draft business letters containing special features and enumerated items and requiring different sizes of stationery, the student will key/type the letters in the specified format on the specified stationery. At least three of the four letters must be rated acceptable on all applicable items and must be completed within 1 1/2 hours.

ENABLING OBJECTIVES:

1. Use specified letter style.
2. Balance copy vertically.
3. Balance copy horizontally.
4. Use appropriate type of punctuation (open or mixed.)
5. Correct all errors neatly.
6. Type special features correctly.
7. Use specified stationery for letter.
8. Enumerate in the body of a letter by beginning at the left margin, and turnover lines are indented 4 spaces. Leave 2 spaces after the number and period. The items within an enumeration are single-spaced, with double spacing between the items.
9. Tabulated materials balanced horizontally.
10. Tabulated materials vertically spaced (above, below, and internally).
11. Center columnar headings over columns.
12. Use appropriate spacing between columns.

04.10 TASK: Key/type a memorandum to multiple recipients and address interoffice envelopes

PERFORMANCE OBJECTIVE: Given a copy of a rough draft memorandum that has several recipients and contains tabulated material, three interoffice envelopes, the student will type the memorandum in usable form and address the envelopes. All items must be rated acceptable and this task must be completed within 20 minutes.

ENABLING OBJECTIVES:

1. Use appropriate format for memorandum.
2. Address memorandum to individual recipient.
3. Arrange columns attractively.
4. Correct all errors neatly on memorandum.
5. Use appropriate vertical spacing.
6. Address interoffice envelopes correctly.

04.11 TASK: Key/type labels

PERFORMANCE OBJECTIVE: Given a list of five addresses and typing instructions, five mailing labels and five file folder labels, hardware and correction supplies, the student will key/type file folder labels and mailing labels. All labels must be typed in correct format according to the following enabling objectives, with all errors neatly corrected. This task must be completed within 10 minutes.

ENABLING OBJECTIVES:

File labels:
1. Insert file label strip.
2. Type name on file folder labels in filing order and in all caps.
3. Position name of company or individual on line 2, 3 spaces from left edge.
4. On file folder label, type only company or individual's name, city, state and ZIP omitting street address.

Mailing labels:
1. Visually center mailing address on form.
2. Type address in OCR format.

04.12 TASK: Key/type a report using footnotes, endnotes, or parenthetical documentation

PERFORMANCE OBJECTIVE: Given a copy of a rough draft report containing main headings, side headings, and paragraph headings, footnotes, endnotes, or parenthetical documentation; access to a dictionary or a word-division manual; necessary supplies; the student will key/type the

report in the specified format. All errors must be neatly corrected.

ENABLING OBJECTIVES:

Report with footnotes:

1. Review format styles for footnotes, endnotes, and parenthetical documentation.
2. Identify differences in the three format styles.
3. Identify the different procedures necessary for a typewriter and a computer.
4. Recognize that different formats are used in different settings.
5. Key/type document using each format.
6. Correct all errors neatly.

04.13 TASK: Key/type multi-copy printed business forms

PERFORMANCE OBJECTIVE: Given four types of blank printed business forms that require information to be placed on lines, in boxes, after guide words, or in columns; hardware; necessary supplies; and information necessary for completing the forms; the student will key/type the information on to the printed forms in usable form. All applicable information must be placed onto the forms in the appropriate spaces, evenly aligned with no errors.

ENABLING OBJECTIVES:

1. The student will key/type addresses using OCR format.
2. Key/type heading information 2 spaces after the printed guided words.
3. Align typing with printed words.
4. Align decimals in money columns.
5. Center amounts in quantity, unit price and total columns.
6. Type description material 2 spaces from vertical rule. Indent carryover lines 3 or 5 spaces.
7. Underline last amount in total.

04.14 TASK: Key/type a news release

PERFORMANCE OBJECTIVE: Given an edited, rough-draft copy of a news release, instructions, hardware, plain paper and correction supplies, and access to a dictionary or a word-division manual, the student will key/type the news release in the format specified, as edited, with all errors corrected. This task must be completed within 20 minutes.

ENABLING OBJECTIVES:

1. Set margins at 1" on top, right and left.
2. Set tab for 2 spaces past longest guide word.
3. QS after heading.
4. Center title of news release in all caps.
5. QS after title.
6. Type body using DS and indented paragraphs.
7. Set up date line in the first line of the body. Include city of release, date. Include state if city is not well known.
8. Center the word END or ### after body.

04.15 TASK: Key/type minutes of a meeting

PERFORMANCE OBJECTIVE: Given a partially handwritten draft of minutes of a meeting and instructions, the student will key/type the minutes in mailable form. All applicable items must be acceptable and the task must be completed within 20 minutes.

ENABLING OBJECTIVES:

1. Use 8 1/2 by 11 white bond paper.
2. Set margins for 6-inch line.
3. Center name of group and/or meeting in all capital letters on line 10, leaving 1-1/2 inch top margin.
4. Double-space down; center in all capital and lowercase letters the date and scheduled time of meeting.
5. Double space below date and time the place meeting was held; center in all capital and lowercase letters.
6. Triple space below meeting place listing Members Present, double space and list Members Absent.
7. Type initial paragraph of meeting minutes triple space below attendance.
8. Organize agenda according to old business and new business.
9. Type signature of the person preparing the minutes on the fourth line below the concluding paragraph. It may be typed at left margin or begun at the page center. The preparer's signature is placed directly above he typed signature line.

04.16 TASK: Key/type tables in ruled and boxed form

PERFORMANCE OBJECTIVE: Given a copy of two rough draft, four-column tables containing primary and secondary headings and two-and three-line columnar headings; instructions; necessary supplies; the student will key/type the tables in ruled and boxed forms.

ENABLING OBJECTIVES:

Ruled

1. Center material vertically and horizontally.
2. Select an even number of spaces to place between columns.
3. Use inverted pyramid format for titles over one line. Center title in all caps; then SS. Type horizontal ruling between title and columnar headings.
4. Use gravity method for columnar headings of 2 or more lines.
5. Use a SS before and DS after horizontal rulings. Do not underline columnar headings. All horizontal rulings need to be the same length.

Boxed

1. Add vertical rulings between columns placing equal distance from columns.
2. Extend horizontal rulings 3 spaces beyond table margins; place vertical rulings at each side of table.
3. Vertical rulings may be typed or drawn.

04.17 TASK: Key/type material from handwritten copy

PERFORMANCE OBJECTIVE: Given handwritten material and instructions, the student will type the material in mailable form.

ENABLING OBJECTIVES:

1. Proofread and edit copy.
2. Use correct format.
3. Correct spelling and punctuation.
4. Correct errors on original copy neatly.

04.18 TASK: Key/type a standardized document by merging selected paragraphs and variable information

PERFORMANCE OBJECTIVE: Given instructions, material, and automated office equipment, the student will merge selected paragraphs and variable information together to make a complete document. Final document must be mailable.

ENABLING OBJECTIVES:

1. Use acceptable format.
2. Balance copy horizontally and vertically.
3. Type the specified paragraphs in proper sequence.
4. Enter all variable information in all proper places.
5. Correct all errors.

04.19 TASK: Key/type from a rough draft copy containing proofreaders' marks

PERFORMANCE OBJECTIVE: Given typed material containing spelling, word usage, subject/verb and punctuation errors, the student will locate the errors and use the standard proofreader marks to indicate the necessary corrections with 90 percent accuracy.

ENABLING OBJECTIVES:

1. Read material to check for content and consistency of style throughout the document.
2. Know standardized revision marks to show corrections.
3. Correct all spelling, word usage, subject/verb and punctuation errors.
4. Type final copy using correct format.
5. Correct errors neatly on original copy.

04.20 TASK: Key/type different sizes of documents

PERFORMANCE OBJECTIVE: Given material and instructions the student will type different size documents. All items must be mailable.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of different size documents.
2. Understand the appropriate use of each size document.
3. Format correctly, in mailable form, each size document.

04.21 TASK: Perform keyboard functions using an integrated software package

PERFORMANCE OBJECTIVE: Given an integrated software package, the student will key material combining a document, database, and spreadsheet.

ENABLING OBJECTIVES:

1. Demonstrate knowledge of word processing concepts and terms.
2. Demonstrate the ability to manipulate tutorial/prekeyed data and formulas at desired locations on a spreadsheet using correct operating procedures.
3. Demonstrate the ability to manipulate tutorial or prekeyed database program.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 5 - PERFORM FILING ACTIVITIES

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

Each task describes an occupational activity which will result in a finished process or product. Such a process or product should always allow an evaluation using standards which address the operation, appearance, dimensions, time in which achieved, or similar characteristics. The tasks listed in each module represent the basic activities required of each student to demonstrate entry level competence for that specific system or field of study within business occupations.

The capability for providing instructional experiences and practical application of the tasks contained in each module will determine the scope of the business systems specialists. In this regard, the student's maturity and preparation to receive instructions well as the availability of equipment and the expertise of the instructional staff will be of primary importance. Individual records of student performance in completing the tasks listed within each module should be maintained.

Although some provision is made for basic mathematics and communication skills within these standards, they may not be adequate to meet the needs of individual students. Counseling, guidance, and diagnostic test results may indicate a need for further preparation in these areas. In such cases, instructors are encouraged to utilize the resources and personnel within the institution to improve or complement the instructional process.

It is the goal of this program standard to provide a level of instruction which will impart entry level employment skills. Students should be carefully counseled on the importance of attaining competency in the tasks assigned. As in virtually all occupations today, business systems specialists will require periodic up-dating and review in the future. It is important that each student understand that meeting the program standards is essential not only to obtain employment today but also to have a base upon which to retain employment in the future.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 5 - PERFORM FILING ACTIVITIES

05.0 PERFORM FILING ACTIVITIES--The student will be able to:

- 05.01 Index, code, sort, and store materials alphabetically
- 05.02 Identify types of filing supplies, equipment, and procedures
- 05.03 Index, code, sort, and file numerically
- 05.04 Index, code, sort, and file materials geographically
- 05.05 Index, code, sort, and file materials by subject
- 05.06 Retrieve materials from files
- 05.07 Cross-reference materials in the alphabetic, numeric, alpha-numeric, geographic, and subject filing systems
- 05.08 Search for lost materials in files
- 05.09 Keep classified or confidential file materials secure
- 05.10 Transfer and discard files

MODULE 5 - PERFORM FILING ACTIVITIES

05.01 TASK: Index, code, sort, and store materials alphabetically

PERFORMANCE OBJECTIVE: Given 25 pieces of correspondence, a file (or simulated file) with guides and folders set up for alphabetic filing, and instructions to apply the basic alphabetic and chronological rules, the student will index, code, sort, and file at least 21 of the 25 pieces correctly.

ENABLING OBJECTIVES:

1. Inspect to determine what to file under.
2. Code for filing.
3. Rough sort by letters of the alphabet.
4. Fine sort in alphabetic order.
5. File in alphabetic order.

05.02 TASK: Identify types of filing supplies, equipment, and procedures

PERFORMANCE OBJECTIVE: Given a list of 20 terms and a list of 20 definitions relating to filing supplies and procedures, the student will match at least 18 of the 20 terms correctly.

ENABLING OBJECTIVES:

1. Define terms.
2. Match terms to definitions.

05.03 TASK: Index, code, sort, and file materials numerically

PERFORMANCE OBJECTIVE: Given 25 pieces of correspondence, a file (or simulated file) with guides and folders set up for numeric filing, and instructions to apply the basic numeric rules, the student will index, code, sort, and file at least 21 of the 25 pieces correctly.

ENABLING OBJECTIVES:

1. Inspect to determine what to file under.
2. Code for filing.
3. Sort by number.
4. File in numeric order.

05.04 TASK: Index, code, sort, and file materials geographically

PERFORMANCE OBJECTIVE: Given 25 pieces of correspondence, a file (or simulated file) with guides and folders set up for geographic filing, and instructions to apply the basic geographic rules, the student will index, code, sort, and file at least 21 of the 25 pieces correctly.

ENABLING OBJECTIVES:

1. Inspect to determine what to file under.
2. Code for filing.
3. Rough sort by letters of the alphabet.
4. Fine sort in alphabetic order by location.
5. File in geographic order.

05.05 TASK: Index, code, sort, and file materials by subject

PERFORMANCE OBJECTIVE: Given ten pieces of correspondence, a file (or simulated file) with guides and folders, the student will set up a subject filing system and index, code, sort, and file at least nine of the ten pieces correctly.

ENABLING OBJECTIVES:

1. Inspect to determine what subject to file under.
2. Code for filing.
3. Rough sort in order by subject.
4. Fine sort in alphabetic order by subject
5. File in subject order.

05.06 TASK: Retrieve materials from files

PERFORMANCE OBJECTIVE: Given five requests for retrieval of correspondence from the file (or simulated file) and proper supplies to complete an out card and a check-out record for each piece of correspondence, the student will retrieve the requested correspondence and correctly complete an out card and a check-out record for at least four of the five requests.

ENABLING OBJECTIVES:

1. Determine what piece of correspondence is being requested.
2. Locate correct correspondence.
3. Prepare an out card.
4. Record in check-out record book.

05.07 TASK: Cross-reference materials in the alphabetic, numeric, alpha-numeric, geographic, and subject filing systems

PERFORMANCE OBJECTIVE: Given cross-referencing information the student will prepare a cross reference card according to a teacher checklist.

ENABLING OBJECTIVES:

1. Discuss need for cross-references.
2. Identify if a cross-reference file is necessary.
3. Properly code, label, and prepare the cross-reference file(s).

05.08 TASK: Search for lost materials in files

PERFORMANCE OBJECTIVE: Given the name of a file, the student will be able to locate a document that has been misfiled in the system within a designated time limit.

ENABLING OBJECTIVES:

1. Check behind and in front of missing file.
2. Check other spellings of file name.
3. Check for out cards and in the check-out register.
4. Identify other people who may have access to files.

05.09 TASK: Keep classified or confidential file materials secure

PERFORMANCE OBJECTIVE: Given confidential materials, the student will determine the location of each file at all times and prevent it from being removed from the file.

ENABLING OBJECTIVES:

1. Keep files secure from unauthorized personnel.
2. Determine method of retrieval for these files.

05.10 TASK: Transfer and discard files

PERFORMANCE OBJECTIVE: Given a transfer schedule, the student will bring active files up to date by discarding and/or transferring the appropriate records according to teacher checklist.

ENABLING OBJECTIVES:

1. Determine retention schedule.
2. Determine method of transferring files from active to semiactive files.
3. Determine method of destruction of files.
4. Update files.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 6 - PERFORM BUSINESS RECORDS ACTIVITIES

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

Each task describes an occupational activity which will result in a finished process or product. Such a process or product should always allow an evaluation using standards which address the operation, appearance, dimensions, time in which achieved, or similar characteristics. The tasks listed in each module represent the basic activities required of each student to demonstrate entry level competence for that specific system or field of study within business occupations.

The capability for providing instructional experiences and practical application of the tasks contained in each module will determine the scope of the business systems specialists. In this regard, the student's maturity and preparation to receive instructions well as the availability of equipment and the expertise of the instructional staff will be of primary importance. Individual records of student performance in completing the tasks listed within each module should be maintained.

Although some provision is made for basic mathematics and communication skills within these standards, they may not be adequate to meet the needs of individual students. Counseling, guidance, and diagnostic test results may indicate a need for further preparation in these areas. In such cases, instructors are encouraged to utilize the resources and personnel within the institution to improve or complement the instructional process.

It is the goal of this program standard to provide a level of instruction which will impart entry level employment skills. Students should be carefully counseled on the importance of attaining competency in the tasks assigned. As in virtually all occupations today, business systems specialists will require periodic up-dating and review in the future. It is important that each student understand that meeting the program standards is essential not only to obtain employment today but also to have a base upon which to retain employment in the future.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 6 - PERFORM BUSINESS RECORDS ACTIVITIES

06.0 PERFORM BUSINESS RECORDS ACTIVITIES--The student will be able to:

06.01 Prepare checks and stubs
06.02 Endorse checks using special endorsements
06.03 Prepare a deposit slip and adjust checkbook
06.04 Prepare bank reconciliations
06.05 Prepare purchase requisitions
06.06 Prepare purchase orders
06.07 Prepare invoices
06.08 Prepare sales slips
06.09 Maintain petty cash records
06.10 Demonstrate a knowledge of accounting cycles

MODULE 6 - PERFORM BUSINESS RECORDS ACTIVITIES

06.01 TASK: Prepare checks and stubs

PERFORMANCE OBJECTIVE: Given a set of checks and their corresponding stubs, prepare checks and stubs. All checks must be prepared in accordance with bank recommendations and all stub balances must balance with the instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of correct check writing techniques.
2. Demonstrate a knowledge of terms related to preparing checks and stubs.
3. Calculate a new balance after a check is written.
4. Complete the check register(s) or stubs.
5. Fill out the standard parts of a standard check.
6. Correctly spell dollar amount numbers in standard written form.

06.02 TASK: Endorse checks using special endorsements

PERFORMANCE OBJECTIVE: Given a set of incoming checks and directives for the checks to be endorsed using the various special endorsements, correctly endorse each check as per the directives. The special endorsements must be made in accordance with accepted bank recommendations.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms related to the special endorsements of checks.

2. Identify the correct end of a check to be use for endorsement.
3. Check to ensure that the endorsement is appropriate for the specific check cashing or depositing instructions.
4. Check to ensure proper agreement between the payee of the check and the endorsement.

06.03 TASK: Prepare a deposit slip and adjust checkbook

PERFORMANCE OBJECTIVE: Given a set or list of coin, currency, and properly endorsed checks to be deposited and the corresponding current check stub/register balance, prepare a deposit slip and update the checkbook balance. All deposit slip entries and totals and the updated check stub/register balance must agree with the instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of the terms related to deposit slips and check stub/register balances.
2. Count cash and record total of coin and currency on the deposit slip.
3. Inspect checks for acceptability and proper endorsements and record on the deposit slips.
4. Complete deposit slips with necessary information and correct totals.
5. Compute and record the updated check stub/register balance.

06.04 TASK: Prepare bank reconciliations

PERFORMANCE OBJECTIVE: Given a bank statement and corresponding cancelled checks and the check stub/register for the corresponding checking account, prepare a bank reconciliation finding and correcting all errors required to reconcile the balances.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of the terms and concepts related to preparing bank reconciliations.
2. Compare the amount on each cancelled check with the amount shown on bank statement.
3. Arrange cancelled checks in order by check number.
4. Compare cancelled checks with checkbook stubs/register and check the recording balance, updating accuracy.
5. Identify outstanding checks and deposits.
6. Prepare a bank reconciliation form.
7. Locate and correct all errors required to complete the reconciliation.
8. File cancelled checks and statement.

06.05 TASK: Prepare purchase requisitions

PERFORMANCE OBJECTIVE: Given an item or list of items and the pertinent information regarding the request for purchase of said item(s) and (a) requisition form(s) and requisition log, prepare a purchase requisition form requesting the purchase of the item(s) and log and file the requisition. A checklist will be used to rate the performance. All parts of the form must be filled out acceptably when rated on the checklist.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms related to the preparation of purchase requisitions and the entire purchasing process.
2. Separate items to be ordered from the list into groups according to supplier.
3. Properly complete the requisition form for each supplier indicating all relevant information for each item and any other requested information.
4. Enter the name of supplier(s) and requisition form number(s) in the log.
5. Prepare the requisition for forwarding to the purchasing department, retaining a copy for filing.

06.06 TASK: Prepare purchase orders

PERFORMANCE OBJECTIVE: Given a valid purchase requisition and necessary related internal and external (vendor) information, perform necessary internal and external checks and prepare a purchase order for the requisitioned item(s). Performance will be rated using a checklist with all aspects receiving acceptable ratings.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of all terms related to preparation of purchase orders, purchase order authorization, and the purchasing process.
2. Check requisitioned items against authorized budget.
3. Verify relevant supplier and product information.
4. Properly prepare purchase order form including all requested supplier, product, and authorization information; and unit price, quantity extensions, and totals.
5. Prepare original and necessary copies to be filed and sent to supplier and other internal departments.

06.07 TASK: Prepare invoices

PERFORMANCE OBJECTIVE: Given a blank invoice form and a customer order with all relevant customer, product, tax, and price information, properly prepare the invoice.

Performance will be rated using a checklist with all aspects receiving acceptable ratings.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of all terms related to preparation and processing of invoices.
2. Locate the appropriate product price(s).
3. Determine the appropriate customer trade discount and tax information.
4. Properly prepare an invoice including all requested customer, product, tax, and discount information.
5. Calculate product price extensions, and discounts, and taxes required to determine the correct invoice total.
6. Verify all descriptive and numerical information.
7. Prepare original and copies to be filed and sent to the customer and appropriate internal departments.

06.08 TASK: Prepare sales slips

PERFORMANCE OBJECTIVE: Given a blank sales slip and a list of products purchased with all relevant customer, product, tax, and price information, properly prepare the sales slip. Performance will be rated using a checklist with all aspects receiving acceptable ratings.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of all terms related to preparation of sales slips and sales records.
2. Locate the appropriate product price(s).
3. Determine the appropriate customer information and any applicable discounts.
4. Properly prepare and date a sales slip including all requested customer, product, tax, and discount information.
5. Calculate product price extensions, discount and taxes required to determine the correct sales slip total.
6. Verify descriptive and numerical information after recording and computing.
7. Prepare original to be given to the customer and copies to be filed and/or sent to the appropriate internal departments.

06.09 TASK: Maintain petty cash records

PERFORMANCE OBJECTIVE: Given an established petty cash fund, petty cash vouchers, petty cash record book, checkbook, necessary supplies, and a list of petty cash expenditures, perform the procedures required in completing a petty cash voucher and petty cash record book. Prove and replenish the fund with all records staying in balance when checked with the instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of all relevant terms and procedures for maintaining petty cash funds.
2. Properly prepare a petty cash voucher for each expenditure.
3. Categorize and record each transaction in the petty cash record book.
4. Prove and calculate the amount required to replenish the petty cash fund.
5. Prepare a voucher or check to replenish the fund.

06.10 TASK: Demonstrate a knowledge of accounting cycles

PERFORMANCE OBJECTIVE: Given a list of steps in a normal accounting cycle, describe each step, with its importance in the cycle and how it relates to the other steps. Indicate the order in which it should be performed in a normal accounting cycle. Description of each step must include salient points listed in the instructor's key and must be listed in the correct order as they should appear in the cycle.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of accounting terms, concepts, and processes as they relate to accounting cycles.
2. Demonstrate a knowledge of the order in which steps in the accounting process are to be performed.
3. Demonstrate an awareness of the content and chronological relationship between each step in accounting cycles.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 7 - PERFORM COMMUNICATION ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 7 - PERFORM COMMUNICATION ACTIVITIES

07.0 PERFORM COMMUNICATION ACTIVITIES--The student will be able to:

- 07.01 Follow oral and written instructions
- 07.02 Demonstrate appropriate telephone procedures for telecommunications
- 07.03 Compose business correspondence and related documents
- 07.04 Prepare, outline, and deliver a short oral presentation
- 07.05 Prepare visual material to support an oral presentation
- 07.06 Participate in group discussion as a member and as a leader
- 07.07 Obtain appropriate information from graphics, maps, or signs
- 07.08 Locate and record information from written resources, including current business periodicals
- 07.09 Dictate using recording equipment
- 07.10 Annotate letters, reports, and/or news articles
- 07.11 Spell and define words, including business terms
- 07.12 Define terms associated with communications
- 07.13 Edit documents using proofreader's marks

MODULE 7 - PERFORM COMMUNICATION ACTIVITIES

07.01 TASK: Follow oral and written instructions

PERFORMANCE OBJECTIVE: Given a sequence of written and oral instructions, the student will demonstrate an ability to follow instructions as evidenced by completion of the task with an acceptable level of accuracy on a teacher provided checklist.

ENABLING OBJECTIVES:

1. Listen to oral instructions.
2. Interpret oral instructions.
3. Determine if clarification is necessary.
4. Follow instructions.
5. Read written instructions.
6. Interpret written instructions.
7. Determine if clarification is necessary.
8. Follow written instructions.
9. Evaluate results.

07.02 **TASK: Demonstrate appropriate telephone procedures for telecommunications**

PERFORMANCE OBJECTIVE: Given two situations requiring special telecommunications procedures, the student will demonstrate ability to perform suitably in each case according to a checklist.

ENABLING OBJECTIVES:

1. **Identify method to be used.**
2. **Identify procedure to be followed.**
3. **List acceptable telephone techniques.**
4. **Follow acceptable telephone techniques.**

07.03 **TASK: Compose business correspondence and related documents**

PERFORMANCE OBJECTIVE: Given a variety of business situations, the student will compose correspondence or documents in response to the situation in a clear, concise, and appropriate manner with an acceptable level of accuracy on a teacher-provided checklist.

ENABLING OBJECTIVES:

1. **Determine whether response requires correspondence or a document.**
2. **Conduct necessary research in formulating the response.**
3. **Prepare an outline or rough draft to organize the response.**
4. **Compose the response using appropriate grammar, spelling, and structure to properly meet the requirements of the request.**

07.04 **TASK: Prepare, outline, and deliver a short oral presentation**

PERFORMANCE OBJECTIVE: Given a list of speaking topics and a checklist, the student will deliver a 3 to 5-minute speech with all items on the checklist receiving an acceptable rating.

ENABLING OBJECTIVES:

1. **Evaluate audience.**
2. **Evaluate topics for interest, knowledge, and information available.**
3. **Select suitable topic.**
4. **Determine scope to be covered.**
5. **Identify parts of a speech (Introduction, Body, Conclusion).**
6. **Develop outline.**
7. **Evaluate resources available.**

8. Gather information.
9. Evaluate information.
10. Synthesize information.
11. Prepare speech.
12. Complete notes to be used for speech.
13. Practice speech on tape.
14. Listen to tape.
15. Deliver speech.

07.05 TASK: Prepare visual material to support an oral presentation

PERFORMANCE OBJECTIVE: Given a topic and adequate information and materials, student will prepare visual aids to support an oral presentation with acceptable ratings in all categories on a checklist.

ENABLING PERFORMANCES:

1. Identify advantages of visual materials.
2. Identify optional types of visuals available.
3. Identify information that can be used in visual materials.
4. Evaluate audience.
5. Evaluate site.
6. Select media appropriate for size and background of audience and site.
7. Prepare visual materials.
8. Determine necessary equipment to be used.

07.06 TASK: Participate in group discussions as a member and as a leader

PERFORMANCE OBJECTIVE: Given a group settings, the student will participate as a member and as a leader and demonstrate an acceptable level of participation on each section of the a teacher-provided checklist.

ENABLING OBJECTIVES:

1. Identify various roles within a group setting.
2. Identify appropriate behavior within the group.
3. Actively participate in discussion.
4. Identify leadership qualities.
5. Identify leadership responsibilities.
6. Demonstrate leadership abilities.
7. Identify goals of group.
8. Elicit group discussion.
9. Listen to each participant.
10. Synthesize information gathered and restate.

07.07 TASK: Obtain appropriate information from graphics, maps, or signs

PERFORMANCE OBJECTIVE: Given an example of graphics, a map, and a sign and queries about each, student will correctly answer each question with 80% accuracy.

ENABLING OBJECTIVES:

1. Identify graphics.
2. Identify map.
3. Identify signs.
4. Identify legends given on data.
5. Define terminology used in conjunction with graphics, maps, and signs.
6. Locate specific information for each item.
7. Interpret information.
8. Compile information.

07.08 TASK: Locate and record information from written resources, including current business periodicals

PERFORMANCE OBJECTIVE: Given a research project which will include a list of information to locate and retrieve, the student will locate and present information requested with 90% accuracy.

ENABLING OBJECTIVES:

1. List business periodicals.
2. Determine location of business periodicals.
3. Discuss the use of Tables of Contents and Indexes.
4. Read article.
5. Gather specific information from article.
6. Summarize, highlight, condense, combine, or restate information.
7. Record information gathered.
8. Present information requested.

07.09 TASK: Dictate using recording equipment

PERFORMANCE OBJECTIVE: Given a scenario and recording equipment, the student will dictate information to be evaluated according to a checklist.

ENABLING OBJECTIVES:

1. List procedures for operating recording equipment.
2. Operate recording equipment.
3. List proper dictating techniques.
4. Collect necessary materials for dictation.
5. Plan dictation
6. Organize dictation
7. Demonstrate ability to dictate.

07.10 TASK: Annotate letters, reports, and/or news articles

PERFORMANCE OBJECTIVE: Given a letter, short report and news release, the student will correctly annotate each according to a checklist.

ENABLING OBJECTIVES:

1. Define "annotate."
2. List the purposes of annotating.
3. Recognize proper annotating marks.
4. Annotate documents.

07.11 TASK: Spell and define words, including business terms

PERFORMANCE OBJECTIVE: Given business documents and necessary reference materials including equipment with spell checker, the student will with 100 percent accuracy key/type and print the documents. The student will make decisions concerning word usage during the testing by supplying key terms.

ENABLING OBJECTIVES:

1. Explain the importance of correct spelling.
2. Explain the importance of a broad vocabulary.
3. Identify frequently used business terms.
4. Demonstrate use of a spell checker.
5. Find words in a dictionary.
6. Demonstrate use of a thesaurus.
7. Define business terms.

07.12 TASK: Define terms associated with communications

PERFORMANCE OBJECTIVE: Given terms associated with communications, the student will with 100 percent accuracy match the definition to the term.

ENABLING OBJECTIVE:

1. Identify communication terms.
2. Define communication terms.
3. Use communication terms in business documents.

07.13 TASK: Edit documents using proofreader's marks

PERFORMANCE OBJECTIVE: Given business documents, the student will proofread and edit using proofreader's marks with 100 percent accuracy.

ENABLING OBJECTIVES:

1. Explain why it is important to use standard proofreader's marks.

2. Identify proofreader's marks.
3. Demonstrate ability to use proofreaders' marks.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 8 - PERFORM INFORMATION PROCESSING ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 8 - PERFORM INFORMATION PROCESSING ACTIVITIES

08.0 PERFORM INFORMATION PROCESSING ACTIVITIES--The student will be able to:

- 08.01 Demonstrate knowledge of computer systems
- 08.02 Locate requested information on a computer printout
- 08.03 Identify applications of computers in business
- 08.04 Identify terms commonly used in information processing
- 08.05 Identify automated business systems, equipment components and electronic media
- 08.06 Edit letters and documents using automated equipment
- 08.07 Input, store, and output letters from handwritten or typed material on automated equipment
- 08.08 Input, store, and output dictated letters and documents on automated equipment
- 08.09 Input, store and output tabulated documents from handwritten or typed material on automated equipment
- 08.10 Revise stored documents and output them on automated equipment
- 08.11 Sequence and define the steps of an information processing cycle
- 08.12 Input numeric data
- 08.13 Use office operations manual
- 08.14 Develop a flowchart
- 08.15 Perform "start-up" procedures on a computer system
- 08.16 Develop a component of an office operations manual
- 08.17 Perform computer activities using database
- 08.18 Perform computer activities using spreadsheets
- 08.19 Perform computer activities in communications
- 08.20 Perform computer activities with spreadsheets using graphics software
- 08.21 Perform computer activities using the graphic functions of a word processing program
- 08.22 Edit and verify printout information
- 08.23 Verify printout totals

MODULE 8 - PERFORM INFORMATION PROCESSING ACTIVITIES

08.01 TASK: Demonstrate knowledge of computer systems

PERFORMANCE OBJECTIVE: Given information about computer systems, the student will be able to list and

describe major operating systems used in business and industry with 100% accuracy.

ENABLING OBJECTIVES:

1. Define the terms operating system and system software.
2. Describe the various types of operating systems, including single program, multiprogramming, multiprocessing, and virtual machine.
3. Explain the differences in operating system capabilities.
4. Describe the functions of an operating system, including allocating system resources, monitoring system activities, and using utilities.
5. Name and briefly describe the major operating systems that are being used today, including DOS, UNIX, and OS/2.

8.02 TASK: Locate requested information on a computer printout

PERFORMANCE OBJECTIVE: Given several computer printouts, the student will be able to answer with 100% accuracy, questions pertaining to the location of information on the printouts.

ENABLING OBJECTIVES:

1. Review several different styles/types of computer printouts from different software packages.
2. Locate specific information on the printouts.
3. Respond to pertinent questions about data on the printouts.
4. List possible information that could be obtained from a computer printout.

8.03 TASK: Identify applications of computers in business

PERFORMANCE OBJECTIVE: Given a list of computer software packages, the student will prepare a report detailing five different computer applications with acceptable ratings on a teacher provided checklist.

ENABLING OBJECTIVES:

1. Prepare a list of computer software packages available.
2. Research the applications of popular software packages.
3. Review proper report format.
4. Prepare rough draft of a report detailing applications of software packages.

08.04 TASK: Identify terms commonly used in information processing

PERFORMANCE OBJECTIVE: Given a list of terms commonly associated with information processing, the student will be able to define these terms with 100% accuracy.

ENABLING OBJECTIVES:

1. Compile a list of information processing terminology.
2. Discuss information processing terminology.
3. Define information processing terminology.

08.05 TASK: Identify automated business systems, equipment components and electronic media

PERFORMANCE OBJECTIVE: Given a project concerning automated business systems, the student will be able to describe an automated business system by identifying and describing the components and media configuration with 100% accuracy.

ENABLING OBJECTIVES:

1. Define an automated business system.
2. Identify and describe the components of an automated business system.
3. Identify and describe the media used in word processing, electronic mail, voice mail, desktop publishing, facsimile, image processing, and teleconferencing.

08.06 TASK: Edit letters and documents using automated equipment

PERFORMANCE OBJECTIVE: Given rough draft documents, the student will edit the materials to achieve mailable form within a given time frame.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of proofreading marks.
2. Demonstrate the ability to follow special instructions and make revisions that are necessary.
3. Demonstrate the ability to utilize automated equipment and word processing software.
4. Demonstrate the ability to define and produce mailable copy.

08.07 TASK: Input, store, and output letters from handwritten or typed material on automated equipment

PERFORMANCE OBJECTIVE: Given handwritten or typed letters, the student will input, store, and output

letters. All letters must be in mailable form and completed within a given time frame.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of formatting a letter.
2. Demonstrate the ability to follow special instructions.
3. Demonstrate the ability to utilize automated equipment and word processing software.
4. Demonstrate the ability to define and produce mailable letters.

08.08 TASK: Input, store, and output dictated letters and documents on automated equipment

PERFORMANCE OBJECTIVE: Given dictated letters and documents, the student will input, store, and output letters and documents in mailable form within a given time frame.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of formatting letters and documents.
2. Demonstrate the ability to follow special instructions.
3. Demonstrate the ability to utilize transcription equipment, computer, printer, and word processing software.
4. Demonstrate the ability to define and produce mailable letters and documents.

08.09 TASK: Input, store, and output tabulated documents from handwritten or typed material on automated equipment

PERFORMANCE OBJECTIVE: Given handwritten or typed tabulated documents, the student will input, store, and output tabulated documents in mailable form within a given time frame.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of formatting tabulated documents.
2. Demonstrate the ability to follow special instructions.
3. Demonstrate the ability to utilize automated equipment and word processing software.
4. Demonstrate the ability to define and produce mailable tabulated documents.

08.10 TASK: Revise stored documents and output them on automated equipment

PERFORMANCE OBJECTIVE: Given stored documents requiring revision, the student will revise and output documents in mailable form within a given time frame.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of formatting documents.
2. Demonstrate the knowledge to follow special instructions and to make necessary revisions.
3. Demonstrate the ability to utilize automated equipment and word processing software.
4. Demonstrate the ability to define and produce mailable documents.

08.11 TASK: Sequence and define the steps of an information processing cycle

PERFORMANCE OBJECTIVE: Given information about the information processing cycle, the student will be able to identify, describe, and sequence the steps of the cycle with 100% accuracy.

ENABLING OBJECTIVES:

1. Identify the four operations of the information processing cycle: input, processing, output, and storage.
2. Define input operations.
3. Identify media used for the input of data.
4. Define output operations.
5. Identify media used for the output of data.
6. Define storage operations.
7. Identify the media used for the storage of data.
8. Define processing operations.
9. Sequence the four operations of the information processing cycle.

8.12 TASK: Input numeric data

PERFORMANCE OBJECTIVE: Given several columns of numerical data, the student will input the data with 100% accuracy using the 10-key numeric pad on a computer.

ENABLING OBJECTIVES:

1. Discuss the use of the num-lock key.
2. Use proper fingering on a 10-key numeric pad.
3. Perform drills on 10-key pad involving columns of numbers.
4. Take speed tests to develop speed and accuracy.

08.13 TASK: Use an office operations manual

PERFORMANCE OBJECTIVE: Given an office operations manual and a task, the student will be able to locate the proper procedure for the performance of that task with 100% accuracy.

ENABLING OBJECTIVES:

1. Define the purpose of an operations manual.
2. Define the organization of an operations manual.
3. Describe the process of locating information in an operations manual.

08.14 TASK: Develop a flowchart

PERFORMANCE OBJECTIVE: Given a task, the student will draw a flowchart using the appropriate symbols to illustrate the steps required to accomplish the task with 100% accuracy.

ENABLING OBJECTIVES:

1. Describe the process of breaking a task down into its component parts.
2. Identify and describe the symbols used to illustrate specific tasks.
3. Explain how the steps of a task must be sequenced to complete the task in a logical order.
4. Explain how to draw and connect the steps of a task using flowchart symbols to illustrate the steps.

08.15 TASK: Perform "start-up" procedures on a computer system

PERFORMANCE OBJECTIVE: Given a microcomputer and the appropriate software, the student will be able to prepare the system for operation with 100% accuracy.

ENABLING OBJECTIVES:

1. Identify the working parts of a computer system, including the processor unit, monitor, disk drive, keyboard, and printer.
2. Locate the power switches for each component of the computer system.
3. Demonstrate the proper handling and care of diskettes.
4. Demonstrate the proper procedures and sequence for inserting diskettes.

08.16 TASK: Develop a component of an office operations manual

PERFORMANCE OBJECTIVE: Given a task, the student will be able to identify and sequence the steps required to perform the task and develop a written procedure that could be included in an operations manual with acceptable ratings on a teacher provided checklist.

ENABLING OBJECTIVES:

1. Identify the component parts of a given task.
2. Sequence the component parts into a logical order.
3. Write procedural statements to accomplish each component part.
4. Incorporate the procedural statements into a format consistent with a given operations manual.

08.17 TASK: Perform computer activities using database

PERFORMANCE OBJECTIVE: Given raw data, the student will create the structure, edit, index, manipulate data, print data and perform disk maintenance duties of the database with 100% accuracy.

ENABLING OBJECTIVES:

1. Create a structure for a database file.
2. Modify an existing structure for a database.
3. Enter data into a database.
4. Edit data in a database.
5. Index a database file.
6. Create and print reports using database information.
7. Save database files to a data disk.
8. Erase database files from a data disk.
9. List all database files stored on a disk.

08.18 TASK: Perform computer activities using spreadsheets

PERFORMANCE OBJECTIVE: Given raw data, the student will create a spreadsheet to present data in a pre-determined format, print the spreadsheet and save the spreadsheet to disk with 100% accuracy.

ENABLING OBJECTIVES:

1. Input data into a cell.
2. Change column widths.
3. Input labels (text) and values (numbers).
4. Change labels (left, right, center).
5. Use label prefixes.
6. Create headings.
7. Format values.
8. Copy, move, or delete a cell.
9. Edit cells.
10. Insert/delete columns and rows.

11. Copy, move, or delete a range.
12. Create formulas.
13. Calculate/recalculate values.
14. Save file to data disk.
15. Combine parts of spreadsheets into a single spreadsheet.
16. Extract part of a spreadsheet into a file.
17. Erase spreadsheet files from a data disk.
18. List all spreadsheet files stored on a disk.
19. Print a spreadsheet.

08.19 TASK: Perform computer activities in communications with modems

PERFORMANCE OBJECTIVE: Given a file on a disk, the student will send the file with 100% accuracy through a modem to another computer.

ENABLING OBJECTIVES:

1. Discuss characteristics of modems.
2. List terminology associated with modems.
3. Detail the procedures for sending a file.
4. List software packages available for use with a modem.
5. List error messages, what they mean, and how to correct the problem.

08.20 TASK: Perform computer activities with spreadsheets using graphics software

PERFORMANCE OBJECTIVE: Given a completed spreadsheet, the student will create three variations of a graph and print the graph in different positions with 100% accuracy.

ENABLING OBJECTIVES:

1. List the different styles of graphs.
2. Define the parts of a graph.
3. Distinguish between naming and saving a graph.
4. List the steps to print a graph.
5. Demonstrate the ability to rotate a graph.
6. Discuss the appropriate type of graph style to use to present the requested information.
7. Demonstrate the ability to make a graph look professional--titles, fonts, etc.

08.21 TASK: Perform computer activities using the graphic functions of a word processing program

PERFORMANCE OBJECTIVE: Given graphic files, the student will integrate the graphics into a word processing document with 100% accuracy.

ENABLING OBJECTIVES:

1. List the steps to "pull-in" a graphic to the word processing package.
2. Demonstrate the ability to rotate the graphic.
3. Demonstrate the ability to scale a graphic.
4. Discuss the placement of a graphic on a page.
5. Demonstrate the ability to edit the graphic.
6. List the steps to print the word processing document that contains the graphic.
7. Discuss the use of boxes around graphics.
8. Discuss the use of captions on figures.

08.22 TASK: Edit and verify printout information

PERFORMANCE OBJECTIVE: Given a computer printout and documentation of the data, the student will verify, and edit if necessary, the information on the printout with 100% accuracy.

ENABLING OBJECTIVES:

1. Learn procedures for verifying numerical data.
2. List proofreading rules for data.
3. List proofreaders marks.
4. Identify common proofreading errors.
5. Identify source documents and their relation to computer printouts.

08.23 TASK: Verify printout totals

PERFORMANCE OBJECTIVE: Given a computer printout the student will verify the accuracy of columnar totals with 100% accuracy.

ENABLING OBJECTIVES:

1. Learn two different ways of verifying totals.
2. Identify common errors and how they are detected.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 9 - IDENTIFY CONSUMER ECONOMICS TERMS AND CONCEPTS

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 9 - IDENTIFY CONSUMER ECONOMICS TERMS AND CONCEPTS

09.0 IDENTIFY CONSUMER ECONOMICS TERMS AND CONCEPTS--The student will be able to:

- 09.01 Identify basic concepts of the free enterprise economic system
- 09.02 Identify basic types of sources of consumer credit
- 09.03 Identify elements of a contract
- 09.04 Identify advantages and disadvantages of consumer credit

MODULE 9 - IDENTIFY CONSUMER ECONOMICS TERMS AND CONCEPTS

09.01 TASK: Identify basic concepts of the free enterprise economic system

PERFORMANCE OBJECTIVE: Given a variety of information relevant to the free enterprise system and how it operates, the student, by written examination and classroom interaction will demonstrate a basic understanding of the free enterprise system.

ENABLING OBJECTIVES:

1. List the characteristics of a free enterprise system.
2. Compare the various economic systems and evaluate the advantages of each.
3. List economic goals and discuss how they may be accomplished and how some goals may conflict with others (ie. decision making, scarcity, choice).
4. List variables which raise and lower the price of goods and services.
5. Give examples of the roles of producers, suppliers, and consumers in the market place.
6. Recognize the rational for the free enterprise system.

09.02 TASK: Identify basic types of sources of consumer credit

PERFORMANCE OBJECTIVE: Given a loan application form and current information on consumer credit the student, by written examination, will demonstrate acquired knowledge and understanding and understanding of the concept "consumer credit".

ENABLING OBJECTIVES:

1. Describe the values and purpose of consumer credit.
2. List the various types of credit.
3. Identify sources of credit.
4. Complete a loan application form neatly and accurately.
5. Discuss the cost of using credit.
6. Identify and figure interest types.
7. Discuss the criteria leading institutions use in granting credit.

09.03 TASK: Identify elements of a contract

PERFORMANCE OBJECTIVES: Given a consumer credit contract students will define its content and by written examination demonstrate the degree of comprehension acquired.

ENABLING OBJECTIVES:

1. Define what is meant by a legal contract.
2. List the basic elements of a contract.
3. Identify various types of contracts.
4. Explain how contracts can be dissolved legally/illegally.

09.04 TASK: Identify advantages and disadvantages of consumer credit

PERFORMANCE OBJECTIVE: Given a variety of information on consumer credit (as discussed in objectives 09.02 and 09.03), the student by classroom discussion and written examination will be able to list the advantages and disadvantages of consumer credit.

ENABLING OBJECTIVES:

1. List the responsibilities of using credit.
2. Explain how use of credit effects purchasing power.
3. Discuss overextending debt load and default.
4. Review bankruptcy as a ramification of misused credit.
5. Know how to establish a good credit rating.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 10 - PERFORM MAIL HANDLING ACTIVITIES

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IDAHO PROGRAM STANDARD FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 10 - PERFORM MAIL HANDLING ACTIVITIES

10.0 PERFORM MAIL HANDLING ACTIVITIES-- The student will be able to:

10.01 Classify mail
10.02 Locate ZIP codes
10.03 Process mail
10.04 Select special mail services
10.05 Identify electronic mail services

MODULE 10 - PERFORM MAIL HANDLING ACTIVITIES

10.01 TASK: Classify mail

PERFORMANCE OBJECTIVE: Given pieces of incoming and outgoing mail, the student will correctly classify each item.

ENABLING OBJECTIVES:

1. List classes of mail.
2. Identify when to use each class.
3. Select appropriate class for mailing each item.

10.02 TASK: Locate Zip codes

PERFORMANCE OBJECTIVE: Given addresses and a complete ZIP code book, the student will correctly address an envelope to each address.

ENABLING OBJECTIVES:

1. Explain the importance of a correct Zip code.
2. Find ZIP codes in the ZIP code book.
3. Address an envelope.

10.03 TASK: Process mail

PERFORMANCE OBJECTIVE: Given pieces of outgoing mail, the student will prepare all items for mailing.

ENABLING OBJECTIVES:

1. Address an envelope.
2. Wrap a package.
3. Address a package.
4. Select mail service required.

10.04 TASK: Select special mail services

PERFORMANCE OBJECTIVE: Given situations requiring special mail services, the student will correctly identify the service to be used.

ENABLING OBJECTIVES:

1. List special services available.
2. Explain when a special service is required.
3. Select the special service required.

10.05 TASK: Identify electronic mail services

PERFORMANCE OBJECTIVE: Given situations requiring electronic mail services, the student will choose from a list provided the correct service to be used.

ENABLING OBJECTIVES:

1. Explain the concept of electronic mail.
2. Explain the difference between sending a message and sending mail to an electronic mailbox.
3. Explain the differences between electronic mail and facsimile.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 11 - DEMONSTRATE A KNOWLEDGE OF REPROGRAPHIC ACTIVITIES

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IDAHO PROGRAM STANDARD FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 11 - DEMONSTRATE A KNOWLEDGE OF REPROGRAPHIC ACTIVITIES

11.0 DEMONSTRATE A KNOWLEDGE OF REPROGRAPHIC ACTIVITIES--The student will be able to:

- 11.01 Identify characteristics of reprographic methods
- 11.02 Determine best reprographic methods to use
- 11.03 Define terms used in reprographics
- 11.04 Identify characteristics of paper
- 11.05 Determine appropriate copyright applications

MODULE 11 - DEMONSTRATE A KNOWLEDGE OF REPROGRAPHIC ACTIVITIES

11.01 TASK: Identify characteristics of reprographic methods
PERFORMANCE OBJECTIVE: Given the resources, the student will list and describe the characteristics of several reprographics methods with 100% accuracy.

ENABLING OBJECTIVES:

1. List several different reprographic methods.
2. List characteristics of each method.

11.02 TASK: Determine the best reprographics method to use

PERFORMANCE OBJECTIVE: Given different jobs to be reproduced, the student will determine with 100% accuracy the most effective reprographic method to use.

ENABLING OBJECTIVES:

1. List reprographic methods.
2. Determine per copy cost of using different methods.
3. Determine turnaround time.

11.03 TASK: Define terms used in reprographics

PERFORMANCE OBJECTIVE: The student will compile and define a list of words associated with reprographics with 100% accuracy.

ENABLING OBJECTIVES:

1. List words relating to reprographics.
2. Develop working definitions of words relating to reprographics.

11.04 TASK: Identify characteristics of paper

PERFORMANCE OBJECTIVE: Given a list of three tasks, the student will present a report as to the most appropriate paper to use.

ENABLING OBJECTIVES:

1. List different types of paper.
2. Identify weights of paper.
3. Determine appropriate weight of paper for a particular task.
4. Compare prices of different kinds of paper based on quantity purchased.

11.05 TASK: Determine appropriate copyright applications

PERFORMANCE OBJECTIVE: Given a list of copying tasks, the student will determine with 100% accuracy, which jobs can be reproduced with regard to copyright laws.

ENABLING OBJECTIVES:

1. List ways to identify copy protected materials.
2. Evaluate material for copyright laws.
3. Discuss when it is appropriate to reproduce copy when it is protected material.
4. Make an oral presentation on one copyright law.
5. Discuss copyright laws including legal implications of violations.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 12 - DEVELOP LEADERSHIP SKILLS

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 12 - DEVELOP LEADERSHIP SKILLS

12.0 DEVELOP LEADERSHIP SKILLS--The student will be able to:

12.01 Prepare an agenda
12.02 Determine appropriate action in situations requiring application of business ethics
12.03 Conduct an orderly meeting
12.04 Greet and introduce individuals
12.05 Introduce a speaker
12.06 Demonstrate knowledge of professional organizations
12.07 Demonstrate ability to set priorities
12.08 Demonstrate ability to delegate responsibilities

MODULE 12 - DEVELOP LEADERSHIP SKILLS

12.01 TASK: Prepare an agenda

PERFORMANCE OBJECTIVE: Given an unarranged agenda of 10 procedures to be followed in conducting business at a meeting, the student will prepare a correct agenda. At least 8 of the 10 items must be in the correct order.

ENABLING OBJECTIVES:

1. Describe activities normally handled in a business meeting.
2. List the order of activities included on a normal agenda and provide rationale for the order listed.

12.02 TASK: Determine appropriate action in situations requiring application of business ethics

PERFORMANCE OBJECTIVE: Given a variety of business situations, students will apply principles of business ethics to determine appropriate action using teacher-provided check list.

ENABLING OBJECTIVES:

1. List principles of business ethics.
2. Describe ethical implications of various business practices.

12.03 TASK: Conduct an orderly meeting

PERFORMANCE OBJECTIVE: Given Roberts Rules of Order and an agenda, the student will conduct an orderly meeting to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate appropriate procedure to follow in calling a meeting to order.
2. Demonstrate appropriate use of the gavel to maintain order.
3. Use correct wording in addressing the chair and in making a motion.
4. List priority order of primary motions and describe them.
5. List priority order of secondary motions and describe them.
6. Demonstrate the ability to take minutes of a meeting in a clear organized manner.
7. List ways nominations can be made.
8. List ways ballots may be cast.

12.04 TASK: Greet and introduce individuals

PERFORMANCE OBJECTIVE: Given a written situation and an assignment to introduce one individual orally to another individual, the student will make the introduction properly. A checklist will be used to rate performance. All items must receive an acceptable rating.

ENABLING OBJECTIVES:

1. Demonstrate the proper way to introduce a female to a male or same gender to same gender.
2. Demonstrate the proper way to introduce a younger person to an older person.
3. Demonstrate the proper way to introduce a person of status to someone else.

12.05 TASK: Introduce a speaker

PERFORMANCE OBJECTIVE: Given a written situation and an assignment to introduce a speaker orally, the student will introduce the speaker. A checklist will be used to rate performance. All items must receive an acceptable rating.

ENABLING OBJECTIVES:

1. Prepare an introduction card on speaker; why this person, on this topic, to this audience.
2. Demonstrate appropriate platform behavior.
3. Express friendly comments and thank you following speech.

12.06 TASK: Demonstrate knowledge of professional organizations

PERFORMANCE OBJECTIVE: Given a listing of related professional organizations, the student will define the

organization and describe its purpose with 90 percent accuracy.

ENABLING OBJECTIVES:

1. Discuss the purpose, mission, or goal of related professional organizations.
2. Describe the value in belonging to and being active in professional organizations.

12.07 TASK: Demonstrate ability to set priorities

PERFORMANCE OBJECTIVE: Given a number of tasks to perform and information about the importance of each task, the student will be able to prioritize the tasks and describe the rationale for the order of tasks to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Describe steps to follow in setting priorities.
2. Demonstrate that there may be several correct ways to do things, but that there should be a logical sequence to what is done.

12.08 TASK: Demonstrate ability to delegate responsibilities

PERFORMANCE OBJECTIVE: Given a simulation where individuals with varying levels of responsibility are involved, the student will be able to delegate numerous tasks to the correct individuals with 90 percent accuracy.

ENABLING OBJECTIVES:

1. Describe the value in knowing individual abilities and levels of responsibility in delegating tasks.
2. Demonstrate the ability to determine difficulty of tasks and to break large tasks into separate smaller parts.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 13 - PERFORM DECISION MAKING ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 13 - PERFORM DECISION MAKING ACTIVITIES

13.0 PERFORM DECISION MAKING ACTIVITIES--The student will be able to:

13.01 List the steps in problem solving
13.02 Determine the proper priority of work
13.03 Prepare a day's schedule for an employer
13.04 Choose appropriate action in situations requiring application of business ethics
13.05 Choose appropriate action in situations requiring following a chain of command
13.06 Choose appropriate action in situations requiring effective time management
13.07 Identify ways to assign work to others
13.08 Determine preventive actions for office communication problems
13.09 Select the best ways to handle confidential information
13.10 Identify the best way to provide constructive feedback on improper behavior
13.11 Identify options for solving personnel problems
13.12 Choose appropriate action in solving problems involving violation of business principles
13.13 Demonstrate appropriate office behavior
13.14 Select items for new employee orientation

Module 13 - PERFORM DECISION MAKING ACTIVITIES

13.01 TASK: Use techniques in business situations

PERFORMANCE OBJECTIVE: Given a situation, the student will use proper problem solving techniques to determine the course of action to take as evidenced by acceptable ratings on a checklist with 100% accuracy.

ENABLING OBJECTIVES:

1. Identify problem.
2. Analyze the facts.
3. Find alternatives.
4. Evaluate consequences of alternative outcomes.
5. Select desired consequence (goal).
6. Draw plans to reach goal.
7. Implement your plans.
8. Receive and evaluate feedback.

13.02 TASK: Determine the proper priority of work

PERFORMANCE OBJECTIVE: Given a variety of tasks, student will be able to analyze steps needed to complete and categorize tasks in order of urgency with 100% accuracy.

ENABLING OBJECTIVES:

1. Define criteria for prioritizing tasks.
2. Identify tasks to be completed.
3. Analyze importance of task completion.
4. Determine steps and sequence of each task.
5. Set time line for completion of steps and task.

13.03 TASK: Prepare a day's schedule for an employer

PERFORMANCE OBJECTIVE: Given a variety of pending tasks and information about the management style of employer, student will prepare a schedule for the employer with sufficient time for each item to be completed. The schedule must match the style of the employer with 100% accuracy.

ENABLING OBJECTIVES:

1. Identify tasks to be completed during the day.
2. Identify preferred hours for non-scheduled activities.
3. Identify tasks which have only one time available (i.e. flight times and appointments).
4. Analyze tasks for urgency.
5. Analyze tasks for approximate completion time.
6. Enter non-negotiable time items into time log.
7. Enter high priority items in earliest available time slots, with time allotments sufficient to complete tasks.
8. Complete time slots with lower priority tasks but with time options allowed for non-scheduled activities if available.

13.04 TASK: Choose appropriate action in situations requiring application of business ethics

PERFORMANCE OBJECTIVE: Given problematic situation requiring the application of business ethics and possible solutions, the student will choose the appropriate action by correctly selecting the first three preferred solutions.

ENABLING OBJECTIVES:

1. Define the term "ethics".
2. Examine company's chain of command.

3. Examine policy for ethical avenue for bypassing normal chain of command.
4. Evaluate situation for legal ramifications.

13.05 TASK: Choose appropriate action in situations requiring following of chain of command

PERFORMANCE OBJECTIVE: Given problematic situations regarding the chain-of-command, an organizational chart of the company, and possible solutions for each situation, the student will correctly choose the appropriate action for the most desirable solution in each situation.

ENABLING OBJECTIVES:

1. Describe elements of organizational charts.
2. Examine examples of organizational charts.
3. Trace the chain of command on company organizational charts.
4. Determine exceptions.
5. Recognize the need for formal reporting.
6. Recognize the need for informal reporting.
7. Evaluate situation to determine proper chain of command.

13.06 TASK: Choose appropriate action in situations requiring effective time management

PERFORMANCE OBJECTIVE: Given a situation, the student will analyze a variety of tasks, and establish short and long term goals to accomplish the tasks using time management techniques as evidenced by a checklist.

ENABLING OBJECTIVES:

1. Identify goals.
2. Clearly define goals in writing.
3. Identify time line to reach goals.
4. Identify necessary steps in reaching goals.
5. Analyze time necessary for steps in reaching goals.
6. Plan time log to successfully achieve goals.
7. Evaluate effectiveness.

13.07 TASK: Select and delegate tasks (assign work to others)

PERFORMANCE OBJECTIVE: Given a list of tasks, student will select tasks which could be delegated to someone else to more effectively produce desired results 100% of the time.

ENABLING OBJECTIVES:

1. Identify tasks to be completed.
2. Evaluate tasks for difficulty, sensitivity, and urgency.
3. Select tasks which could be completed effectively by others.
4. Identify appropriate personnel to complete task.
5. Delegate tasks to appropriate personnel.

13.08 TASK: Determine preventive actions for office communication problems

PERFORMANCE OBJECTIVE: Given an office situation, the student will be able to determine preventative actions for communication problems. A checklist of issues to consider would be used to insure best possible solution for successful communication 100% of the time.

ENABLING OBJECTIVES:

1. Discuss various methods of communication within an office.
2. Identify potential communication problem.
3. Identify alternative actions.
4. Analyze alternatives.
5. Select best action.

13.09 TASK: Select the best ways to handle confidential information

PERFORMANCE OBJECTIVE: Given situations requiring handling confidential information, the student will identify solutions to best handle the situation with 100% accuracy.

ENABLING OBJECTIVES:

1. Review company policy regarding confidentiality.
2. Identify qualities of information which make it confidential.
3. Evaluate information for the need for confidentiality and affects or consequences resulting from lack of confidentiality.
4. Identify alternative ways of handling confidential information.
5. Identify results of alternatives.
6. Select appropriate way of handling to correspond with desired results.

13.10 TASK: Identify best way to provide constructive feedback on improper behavior

PERFORMANCE OBJECTIVE: Given situations of improper behavior in the workplace, the student will select the

best way for the employee to provide constructive feedback. All answers must reflect the most acceptable solution available 100% of the time.

ENABLING OBJECTIVES:

1. Identify improper behavior.
2. Identify terms which encourages positive behavior.
3. Identify terms which cause negative behavior.
4. Determine degree to which improper behavior is detrimental to environment, the business or personal lives.
5. Identify and select alternative people with whom to discuss the infraction.
6. Identify appropriate action.

13.11 TASK: Identify options for solving personnel problems

PERFORMANCE OBJECTIVE: Given a personnel problem, student will be able to apply problem in a timely manner. Given choices, student will select the best scenario.

ENABLING OBJECTIVES:

1. Identify personnel problems.
2. Project possible consequences of problem.
3. Analyze cause of problems.
4. Identify company policy regarding situation.
5. Identify key figures in resolution.
6. Determine appropriate personnel for discussion.
7. Discuss problems with appropriate personnel.
8. Find solutions.
9. Initiate solution.

13.12 TASK: Choose appropriate action in solving problems involving violation of business principles

PERFORMANCE OBJECTIVE: Given situation the student will list business principles that were violated and describe appropriate actions to correct the situation with 100% accuracy.

ENABLING OBJECTIVES:

1. Identify problem.
2. Determine why it is a violation of business principles.
3. Project worse-case scenario if not handled.
4. Identify company policies regarding problem.
5. Identify inefficiencies caused by problem.
6. Discuss legal ramifications.

13.13 TASK: Demonstrate appropriate office behavior

PERFORMANCE OBJECTIVE: Given a specific office environment and a case study, the student will demonstrate office behavior in a role playing classroom setting to correspond with appropriate responses according to a checklist.

ENABLING OBJECTIVES:

1. Student will identify type of business.
2. Identify resources for determining company policy.
3. Student will analyze appropriate office atmosphere for different types of business.
4. Student will analyze appropriate behavior to correspond with office atmosphere.
5. Choose appropriate personal behavior for identified office atmosphere.

13.14 TASK: Select items for new employee orientation

PERFORMANCE OBJECTIVE: Given company handbook, required materials, and a checklist, student will select items necessary. The presentation must include all items on a checklist.

ENABLING OBJECTIVES:

1. Identify information necessary for new employees.
2. Identify importance of each topic.
3. Identify alternative ways of presenting information.
4. Evaluate and select appropriate method for presentation of information considering importance of topic.
5. Prepare visual aids for presentation.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 14 - PERFORM MANAGEMENT ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 14 - PERFORM MANAGEMENT ACTIVITIES

14.0 PERFORM MANAGEMENT ACTIVITIES--The student will be able to:

- 14.01 Identify management styles
- 14.02 Prepare managerial reports about production, personnel, equipment, and operational costs
- 14.03 Set priorities
- 14.04 Develop procedures for efficient work flow
- 14.05 Conduct performance appraisals, set goals, and recommend training
- 14.06 Discuss elements of a general budget
- 14.07 Select appropriate action applying business management practices
- 14.08 Apply time management skills to office schedule
- 14.09 Develop short/long range plans including Equal Access/Equal Opportunity (EAEO) guidelines
- 14.10 Develop procedures for handling grievances
- 14.11 Evaluate job applicants based upon interviews
- 14.12 Recommend employees for promotion
- 14.13 Budget office expenses
- 14.14 Sketch layout of an office using principles of ergonomics
- 14.15 Select vendors from whom to purchase office supplies
- 14.16 Organize meetings/seminars
- 14.17 Prepare travel arrangement

MODULE 14 - PERFORM MANAGEMENT ACTIVITIES

14.01 TASK: Identify management styles

PERFORMANCE OBJECTIVE: Given a variety of business situations, students will identify the different management styles to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Display while describing the leadership continuum as demonstrated in the autocratic style, participative style, and free-rein style of management.
2. Identify traits, characteristics, and behaviors of effective leaders.
3. Explain the synthesis of leadership approaches and theories.

14.02 TASK: Prepare managerial reports about production, personnel, equipment, and operational costs

PERFORMANCE OBJECTIVE: Given unarranged statistical and narrative information, the students will prepare four reports in proper content and style. At least three of the four reports must contain accurate content and style.

ENABLING OBJECTIVES:

1. Describe the classifications of business reports.
2. Identify four commonly used formats for written reports and indicate when each would be used.

14.03 TASK: Set priorities

PERFORMANCE OBJECTIVE: Given a variety of business situations, the student will integrate two "to do" lists, and then explain the decision-making steps that he or she went through in the process, using a check list distributed by the instructor.

ENABLING OBJECTIVES:

1. Explain the steps in the decision-making process.
2. Demonstrate a time log and analyze the expenditure of time.
3. Identify an action plan for increasing time efficiency.

14.04 TASK: Develop procedures for efficient work flow

PERFORMANCE OBJECTIVE: Given a list of duties for the next day of work, the student must prepare a daily work plan. This activity will be done to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate the factors of efficiency: work space, reference materials, office equipment, procedures, the worker, and the work.
2. Identify time wasters.

14.05 TASK: Conduct performance appraisals, set goals, and recommend training

PERFORMANCE OBJECTIVE: Given a managerial role playing exercise, the students will be able to identify effective performance review skills. Each student will employ evaluation criteria listed on a check list distributed by the instructor.

ENABLING OBJECTIVES:

1. List characteristics of effective performance reviews.
2. List kinds of rater errors and describe how these errors can be reduced.
3. Describe why goal-setting is important to performance appraisals.
4. Identify how training should help raters focus on observable, ratable behavior.

14.06 TASK: Discuss elements of a general budget

PERFORMANCE OBJECTIVE: Each student will examine his or her past expenses and create a budget for the next month. They are to identify what type of budget they created, and how they handled fixed and variable expenses. This information will be presented in proper format deemed appropriate by the instructor.

ENABLING OBJECTIVES:

1. Provide an overview of budgetary control techniques.
2. Identify types of budgets.

14.07 TASK: Select appropriate action applying business management practices

PERFORMANCE OBJECTIVE: Given a case study relating to various management practices and situations, the student will answer questions relating to the case study and defend his or her rationale to the class.

ENABLING OBJECTIVES:

1. List and describe the basic management functions.
2. Define the term "motivation," and list two motivational techniques.

14.08 TASK: Apply time management skills to office schedule

PERFORMANCE OBJECTIVE: Given one week, students are asked to analyze how their time was spent and record it on a time log to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Discuss the importance of time management.
2. Identify a plan for increasing time efficiency.
3. Demonstrate how time wasters can be eliminated or minimized.

14.09 TASK: Develop short/long range plans including equal access/equal opportunity (EAEO) guidelines

PERFORMANCE OBJECTIVE: The student will go to the library and research the history of a major business firm. They will write a report which identifies the role planning had in the development of the organization. This project will be completed to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Describe the planning process.
2. Identify the nature of organizational goals.
3. Discuss the nature of organizational goals.

14.10 TASK: Develop procedures for handling grievances

PERFORMANCE OBJECTIVE: Given an example of a grievance, the student will discuss in a group setting how both unionized and non-union firms might handle the situation. This activity will be completed to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Identify the basic steps in a grievance procedure.
2. Discuss arbitration as the final phase of a grievance procedure.

14.11 TASK: Evaluate job applicants based upon interviews

PERFORMANCE OBJECTIVE: Given a job description, the student will prepare and present a mock interview in front of the class. The class will evaluate the interview based upon an evaluation form distributed by the instructor.

ENABLING OBJECTIVES:

1. Describe the interview planning process.
2. Identify the barriers to effective interviews which include, differing intentions, bias, fact-inference fallacy, and nonverbal communication.
3. Identify the legal aspects of the interview.
4. Demonstrate good questioning strategies.

14.12 TASK: Recommend employees for promotion

PERFORMANCE OBJECTIVE: Given a business situation, the student will apply the concepts of promotion to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Explain why the effective management of career transitions is important both to individual employees and to the organization as a whole.
2. Describe the procedures commonly used for making promotion decisions which include seniority and merit.

14.13 TASK: Budget office expenses

PERFORMANCE OBJECTIVE: Given a business expenses for a calendar year, the student will prepare a operating budget for the next year to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Identify the objectives that management seeks to attain through the use of budgets and budget performance reports.
2. Discuss the different kinds of costs to be considered when formulating a budget of administrative expenses.

14.14 TASK: Sketch layout of an office using principles of ergonomics

PERFORMANCE OBJECTIVE: Given 300 square feet of space, the student will prepare an office layout that occupies six workstations which incorporates ergonomics and space management principles. These sketches will be completed to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate the major characteristics of the two principal styles of layout--the conventional plan and the open plan.
2. Identify the objectives to be attained by an efficient use of space.
3. Explain the nature of ergonomics and describe how it affects office productivity.

14.15 TASK: Select vendors from whom to purchase office supplies

PERFORMANCE OBJECTIVE: Given sources of suppliers, the student will complete a purchase order to procure office supplies. This form will be completed to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Discuss the need to determine the degree of quality preferred by the company before purchasing office supplies.
2. Identify the procedures in obtaining office supplies.
3. Identify sources of office supplies.

14.16 TASK: Organize meetings/seminars

PERFORMANCE OBJECTIVE: Given a business situation, the student will make the necessary plans before the meeting, and prepare the follow-up tasks after the meeting. This activity will be done to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Identify the responsibilities in planning meetings.
2. Demonstrate the preparation of agendas, minutes, and other post-meeting documents.

14.17 TASK: Prepare travel arrangements

PERFORMANCE OBJECTIVE: Given an business setting, the student will prepare an itinerary for international travel. This exercise will be completed to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Discuss how to make travel arrangements.
2. Demonstrate how to prepare an itinerary.
3. Identify international travel concerns such as passports, visas, currency, time, and cultural differences.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 15 - PERFORM DICTATION/TRANSCRIPTION ACTIVITIES

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

Each task describes an occupational activity which will result in a finished process or product. Such a process or product should always allow an evaluation using standards which address the operation, appearance, dimensions, time in which achieved, or similar characteristics. The tasks listed in each module represent the basic activities required of each student to demonstrate entry level competence for that specific system or field of study within business occupations.

The capability for providing instructional experiences and practical application of the tasks contained in each module will determine the scope of the business systems specialists. In this regard, the student's maturity and preparation to receive instructions well as the availability of equipment and the expertise of the instructional staff will be of primary importance. Individual records of student performance in completing the tasks listed within each module should be maintained.

Although some provision is made for basic mathematics and communication skills within these standards, they may not be adequate to meet the needs of individual students. Counseling, guidance, and diagnostic test results may indicate a need for further preparation in these areas. In such cases, instructors are encouraged to utilize the resources and personnel within the institution to improve or complement the instructional process.

It is the goal of this program standard to provide a level of instruction which will impart entry level employment skills. Students should be carefully counseled on the importance of attaining competency in the tasks assigned. As in virtually all occupations today, business systems specialists will require periodic up-dating and review in the future. It is important that each student understand that meeting the program standards is essential not only to obtain employment today but also to have a base upon which to retain employment in the future.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 15 - PERFORM DICTATION/TRANSCRIPTION ACTIVITIES

15.0 PERFORM DICTATION/TRANSCRIPTION ACTIVITIES--The student will be able to:

- 15.01 Demonstrate techniques in machine dictation and transcription
- 15.02 Transcribe recorded dictation of business related documents into mailable form
- 15.03 Take notes and transcribe into mailable form

MODULE 15 - PERFORM DICTATION/TRANSCRIPTION ACTIVITIES

15.01 TASK: Demonstrate techniques in machine dictation and transcription

PERFORMANCE OBJECTIVE: Given automated equipment and three documents to dictate and transcribe, the student will demonstrate the correct techniques in machine dictation and transcription by producing mailable copy of all three documents within a given time frame.

ENABLING OBJECTIVES:

1. Demonstrate the correct procedure in operating automated equipment.
2. Demonstrate the ability to follow instructions.
3. Demonstrate the ability to transcribe properly.
4. Demonstrate the ability to define and produce mailable documents.

15.02 TASK: Transcribe recorded dictation of business related documents into mailable form

PERFORMANCE OBJECTIVE: Given automated equipment, recorded dictation, and all appropriate reference materials, the student will transcribe all documents in mailable form within a given time frame.

ENABLING OBJECTIVES:

1. Demonstrate the ability to listen.
2. Demonstrate the ability to use automated equipment.
3. Demonstrate the ability to format all documents.
4. Demonstrate the ability to define and produce mailable documents.

15.03 TASK: Take notes and transcribe into mailable form

PERFORMANCE OBJECTIVE: Given dictation at 80 wpm and reference materials, the student will take notes in an acceptable shorthand form and transcribe the documents in mailable form within a given time frame.

ENABLING OBJECTIVES:

1. Demonstrate the ability to listen.
2. Demonstrate the ability to take notes using a shorthand form.
3. Demonstrate the ability to transcribe notes using a shorthand form.
4. Demonstrate the ability to format all documents.
5. Demonstrate the ability to define and produce mailable copy.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 16 - PERFORM LEGAL SPECIALTY ACTIVITIES

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

Each task describes an occupational activity which will result in a finished process or product. Such a process or product should always allow an evaluation using standards which address the operation, appearance, dimensions, time in which achieved, or similar characteristics. The tasks listed in each module represent the basic activities required of each student to demonstrate entry level competence for that specific system or field of study within business occupations.

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Although some provision is made for basic mathematics and communication skills within these standards, they may not be adequate to meet the needs of individual students. Counseling, guidance, and diagnostic test results may indicate a need for further preparation in these areas. In such cases, instructors are encouraged to utilize the resources and personnel within the institution to improve or complement the instructional process.

It is the goal of this program standard to provide a level of instruction which will impart entry level employment skills. Students should be carefully counseled on the importance of attaining competency in the tasks assigned. As in virtually all occupations today, business systems specialists will require periodic up-dating and review in the future. It is important that each student understand that meeting the program standards is essential not only to obtain employment today but also to have a base upon which to retain employment in the future.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 16 - PERFORM LEGAL SPECIALTY ACTIVITIES

16.0 PERFORM LEGAL SPECIALTY ACTIVITIES--The student will be able to:

16.01 Select and complete legal documents
16.02 Schedule appointments and activities
16.03 Record legal office transactions
16.04 Demonstrate knowledge of legal terms
16.05 Locate and record information found in legal references
16.06 Transcribe from recorded legal dictation/proceedings
16.07 Prepare and maintain legal records
16.08 Identify the court in which legal documents should be filed

MODULE 16 - PERFORM LEGAL SPECIALTY ACTIVITIES

16.01 TASK: Select and complete legal documents

PERFORMANCE OBJECTIVE: Given a legal document, identify the document as a noncourt or court document and prepare it according to the correct rules of procedure.

ENABLING OBJECTIVES:

1. Identify and prepare noncourt documents.
   a. Discuss contents of document with supervising attorney and identify it as a court or noncourt document.
   b. Determine if printed law forms are to be used or if the document will be a wholly typed.
   c. Determine the style and format to be used according to established procedures set by the law office.
   d. Determine the procedure to be used for incomplete pages and blank lines within the document.
   e. Identify the usage of capitalization, punctuation, numbers, and amounts of money in legal documents.
   f. Determine the required number of signature lines.
   g. Prepare a backing sheet if required.
   h. Proofread the document more than once.
   i. Present to attorney for review.
   j. Prepare a copy for any party signing the papers as well as a file copy.
   k. Obtain signatures and conform the documents.
   l. Distribute copies to all parties involved.

m. Store office file copy.

2. Identify and complete court documents.
   a. Identify the pleading and/or document to be filed with the court.
   b. Identify the jurisdiction and venue.
   c. Identify office where pleading and/or document is to be filed and determine if filing fee is required.
   d. Prepare the document according to rules of the court having authority to handle the case.
   e. Proofread document.
      (1) Check pleading for correct form regarding case caption, attorney's signature lines, verification, etc.
      (2) Verify form of legal citations, if any.
      (3) Correct spelling, punctuation or grammatical errors or omissions.
      (4) Review for sentence structure and thought composition.
   f. Present to attorney for review.
   g. Prepare instructions and filing request for office where pleading and/or document is to be filed.
      (1) Attach filing fee if required.
      (2) Attach original and required copies along with self-addressed, stamped envelope if original is to be returned file-stamped and/or copy is requested.
   h. Identify and attach all supporting documents.
   i. Arrange for delivery of pleading and/or document by:
      (1) Mail.
      (2) Delivery by messenger.
      (3) Personal delivery.

16.02 TASK: <u>Schedule appointments and activities</u>

PERFORMANCE OBJECTIVE: Given an office calendar, court calendar, and tickler file, demonstrate ability to coordinate, schedule, and record general office appointments and business matters, important dates of pending cases, important matters that require follow up attention, meetings and conferences, hearing and/or court dates, signature signing, document notarization, depositions, and delivery services in accordance with established office policy.

ENABLING OBJECTIVES:

1. Maintain an office calendar to record office appointments, deadlines for the payment of bills, taxes, and insurance, and other office business.
2. Maintain a court calendar to record important dates of pending cases.

a. Record time requirement on calendar as received, e.g., court hearing, depositions, discovery deadlines, etc.
b. Enter data as follows:
(1) Client or case name.
(2) Purpose of meeting or commitment.
(3) Time.
(4) Location.

3. Maintain a tickler or reminder file for routine matters which need follow-up attention.
4. Schedule and coordinate meetings and conferences.
a. Identify type of meeting to be held.
b. Identify meeting participants.
c. Identify potential meeting dates and location.
d. Arrange meeting place.
e. Record meeting time and place in appointment book/calendar.
5. Schedule and record hearing and/or court dates.
a. Identify type of hearing/court date and length of time attorney expects it to last.
b. Identify participants.
c. Identify statute or court rule, if any, regulating time period regarding notice of hearing.
d. Contact court (clerk of court or judge's secretary/administrative assistant) for potential dates.
e. Contact all other participants and arrange date when all parties are available. (Check with attorney to determine when necessary.)
f. Confirm date and place with court.
g. Prepare notice of hearing or confirmation letter to be sent to all participants according to the rules and procedures of the court.
h. Record hearing time and place in appointment book/calendar
6. Schedule and obtain signatures.
a. Identify signator(s).
b. Contact signators to arrange meeting time, date and location. (It is not always necessary to have all signators meet at one place to sign a document.)
c. Record meeting time and place in appointment book/calendar.
7. Schedule and coordinate document notarization.
a. Identify document to be notarized.
b. Identify signators.
c. Contact signators and notary public and arrange meeting time, date, and location.
d. Record meeting time and place in appointment book/calendar.
e. Monitor execution of document.
f. Review executed document to verify notarization.

8. Schedule and record depositions.
   a. Identify deponent, purpose of deposition, and documents to be produced by deponent.
   b. Contact participants to arrange deposition date, time, and location.
   c. Arrange deposition location, e.g., law office conference room, court room, etc.
   d. Contact court reporter to arrange services.
   e. Prepare notice of deposition, subpoena (with witness fee), or confirmation letter if court reporter has not been requested to notify participants.
   f. Record deposition time and location in appointment book/calendar.
9. Schedule and arrange for delivery services.
   a. Assemble documents/materials requiring delivery.
   b. Identify the person(s) to receive the documents/materials and location.
   c. determine date when delivery must be made.
   d. Select a local or national delivery service which can meet delivery deadline.
   e. Contact the delivery service selected to ascertain the extent and requirements of its services.
   f. Set a time for pickup.
   g. Prepare the documents/materials for delivery according to instructions by the service.

16.03 TASK: Record legal office transactions

PERFORMANCE OBJECTIVE: Given transactions involving attorney fees, bank statement reconciliations, payroll and tax reports, trust accounts, petty cash, and interest-bearing investments and notes payable, record the revenue and expenses of the law firm according to the fundamental principles of bookkeeping.

ENABLING OBJECTIVES:

1. Record attorney fees for costs advanced and for services rendered.
2. Reconcile monthly bank statement and record necessary adjustments.
3. Maintain and record payroll records by determining gross earnings, amounts of deduction, and net pay.
4. Maintain trust accounts separately from the firm's accounts and render a complete accounting to the client on a periodic basis.
5. Prepare and maintain payroll tax reports as required by local, state, and federal government entities.
6. Set up and maintain the petty cash fund by preparing petty cash vouchers for all disbursements, periodically replenishing the fund, and preparing a statement of expenditures.

7. Record revenue earned from savings accounts and interest-bearing investments.
8. Record expenses incurred from interest-bearing notes payable.
9. Record general expense transactions incurred through the normal operation of the business.

16.04 TASK: Demonstrate knowledge of legal terms

PERFORMANCE OBJECTIVE: Given tasks to perform in the law office, correctly apply through both oral and written communications knowledge of established legal terminology involving the legal office environment, the law and the court system, legal research, administrative law, litigation, contracts, torts, criminal law, family law, business organizations, real estate, wills, and estates and guardianships.

ENABLING OBJECTIVES:

1. Apply knowledge of terminology involving the legal office environment.
   a. List the types of law office environments.
   b. Identify law office personnel and the structure of the law office.
   c. List the nine canons of the Code of Professional Responsibility and describe the role of the support staff regarding ethics in the law office.
   d. Identify the qualifications and duties of the notary public.
   e. Identify the names and functions of professional organizations associated with legal office support personnel.
2. Apply knowledge of terminology involving the law and the court system.
   a. Define law and describe the development of the American Judicial System.
   b. Categorize the law based on type, individuals involved, nature, and source.
   c. Identify the structure of the federal judicial system.
   d. Identify the structure of state and local judicial systems.
   e. Define original and appellate jurisdiction.
   f. Define venue.
   g. Define and describe the importance of the Statute of Limitations.
   h. Identify and describe the functions of the officers of the court.
   i. Define the jury and describe its function in the judicial process.
   j. Describe how to file documents with the court.

3. Apply knowledge of terminology involving legal research.
   a. Identify standard legal publications housed in the law office library.
   b. Identify legal form books and manuals.
   c. Identify the organization of the National Reporter System.
   d. Define a legal citation.
   e. Identify resource books that establish the guidelines for the correct format of legal citations.
   f. Identify forms of computer-assisted legal research.
4. Apply knowledge of terminology involving administrative law.
   a. Define administrative law.
   b. Identify administrative agencies at the federal, state, and local levels.
   c. Describe the general functions of agencies frequently encountered.
5. Apply knowledge of terminology involving litigation.
   a. Define litigation.
   b. Identify the types of litigation and describe how lawsuits arise.
   c. Identify the phases of a lawsuit.
   d. Identify the forms and procedures used in the various phases of a lawsuit.
6. Apply knowledge of terminology involving contracts.
   a. Define a contract.
   b. Identify the types of contracts.
   c. Describe the essential elements of a contract.
   d. Describe the methods of assignment of a contract.
   e. Describe the methods of discharge of a contract.
   f. Define a breach of contract.
   g. Describe a remedy for a breach of contract.
   h. Identify the forms and procedures used in preparing contracts.
7. Apply knowledge of terminology involving torts.
   a. Define the law of torts.
   b. Identify the types of torts.
   c. Identify the defenses used in torts.
   d. Describe the procedures and requirements for documents used in tort law matters.
8. Apply knowledge of terminology involving criminal law.
   a. Define criminal law.
   b. Identify the classes of crime.
   c. Describe how criminal proceedings are initiated.
   d. Describe the procedure for misdemeanor cases.
   e. Describe the procedure for felony cases.
   f. Describe the appeals procedure for criminal law.
   g. Identify the forms and procedures used in criminal law matters.

9. Apply knowledge of terminology involving family law.
   a. Define family law.
   b. Identify the areas of family law.
   c. Describe the influence of uniform acts in family law.
   d. Describe the procedures and requirements for handling pleadings used in family law matters.
10. Apply knowledge of terminology involving business organizations.
   a. Define the types of business organizations.
   b. Describe the advantages and disadvantages of incorporating.
   c. Describe the corporate structure.
   d. Describe incorporation and related procedures.
   e. Describe the execution and filing of articles of incorporation.
   f. Describe the forms to be prepared and items to be handled for the organizational meeting of shareholders, first meeting of the board of directors, preparation of bylaws, minutes and minutes book, issuance of stock certificates, application for employer identification number, and other miscellaneous forms.
11. Apply knowledge of terminology involving real estate.
   a. Describe the history of real estate law.
   b. Define real estate.
   c. List the forms of ownership of real estate.
   d. List the forms of evidence of title.
   e. List the matters examined which may affect clear and merchantable title of real estate.
   f. Identify the instruments of conveyance.
   g. Describe the preparation of a complete and accurate legal description for real estate.
   h. List the steps followed in the transfer of real estate.
   i. Identify the types of real estate transactions and requisite documents.
   j. Describe the forms and procedures used in the real estate closing.
12. Apply knowledge of terminology involving wills.
   a. Define a will.
   b. Identify the types of wills.
   c. Identify who can have a valid will.
   d. Describe the characteristics/parts of a will.
   e. Describe the function of codicils.
   f. Describe the procedures used in the preparation and execution of wills.
13. Apply knowledge of terminology involving estates and guardianships.
   a. Define and describe the function of the Uniform Probate Code.
   b. Describe the two ways an estate is classified.
   c. Describe the process of determining and proving heirship.

d. Describe the functions of estate administration or probate.
e. Identify the forms and procedures used during the initial client interview.
f. Identify the forms and procedures used in probate.

16.05 TASK: Locate and record information found in legal references

PERFORMANCE OBJECTIVE: Given a legal reference, utilize the law library and other sources to locate relevant statutory law, relevant administrative law, and relevant case law; utilize Shepard's citators to verify citations; and utilize standard citation manuals to record the legal reference in proper form.

ENABLING OBJECTIVES:

1. Use the law library and other relevant sources to locate legal references.
   a. Tour the law library or other relevant sources and locate the card catalog/computer retrieval terminal.
   b. Obtain descriptive literature, if available, on the use of the card catalog/computer terminal and its classification system.
   c. Identify the card catalog/computer terminal entry system pertaining to subject, author or title.
   d. Analyze the topic to be researched by identifying its subject matter, authors, and titles.
   e. Locate in the card catalog/computer terminal entries identifying books and materials for the analyzed topic.
   f. List titles and call/identification numbers.
   g. Locate each book or material.
   h. Request assistance from the staff if unable to locate the books or materials selected.
2. Locate relevant statutory law.
   a. Review client file for facts and legal issues to be researched.
   b. Select statute books relevant to the facts and legal issues.
   c. Review preface, explanatory pages and/or general index of statute books for examples of how they can be used.
   d. Locate statutory references in the general index.
   e. Locate statutory references in statute books, annual supplements, and session laws, when applicable.
   f. Review each statute and its annotations, if any, for application to the facts and legal issues.

g. Cite, summarize, and shepardize the relevant provisions of each statute and, if any, its case annotations, history, notes, and references.

3. Locate relevant administrative law.
   a. Research the Code of Federal Regulations (C.F.R.) by:
      (1) Analyzing the topic to be researched by identifying its facts and legal issues, if any, in descriptive terms.
      (2) Locating C.F.R. index volume.
      (3) Reviewing the preface or explanatory pages of the C.F.R. volumes and the index volume.
      (4) Selecting relevant index volume entries for each descriptive term.
      (5) Locating each selected entry.
      (6) Examining each selected entry (regulation) for relevance to the topic.
      (7) Citing and summarizing relevant provisions.
      (8) Checking monthly and annual indexes to the Federal Register for additional entries.
      (9) Locating each relevant additional entry in the issues of Federal Register.
      (10) Citing and summarizing the relevant provisions of each additional entry.
   b. Research Administrative Regulations published by each state using procedure outlined above.
   c. Research court rules by:
      (1) Discussing with supervising attorney the purpose for research of court rules.
      (2) Locating applicable court rules.
      (3) Selecting relevant entries from the general index or table of contents.
      (4) Examining each selected entry (rule).
      (5) Citing and summarizing provisions of each rule.
      (6) Citing and summarizing provisions of each rule.
      (7) Checking with the clerk of the court for updated rules.

      (CAUTION: Always shepardize.)

4. Locate relevant case law.
   a. Analyze research topic by identifying facts and legal issues in descriptive terms, e.g., parties, places, things, basis of action or issues, defense, and relief sought.
   b. Select relevant case digest.
   c. Review the preface or explanatory pages of the digest and its general index.
   d. Locate topics and subtopics in the general index for each descriptive term.
   e. Locate topics and subtopics in the digest volumes, annual supplements, and updates.

f. Review each topic and subtopic for relevant case summaries.
g. Record citations of relevant case summaries.
h. Retrieve each case by locating:
(1) The cited volume in state reports, regional reporter system, or federal reporter.
(2) Page number in the cited volume.
(3) The case name on the page.
i. Research each case for relevant points of law.
j. Prepare a summary of each relevant case.

5. Utilize Shepard's citators to verify case citations, statutes, and other cited materials.
6. Utilize standard citation manuals to record the legal reference in proper form.

16.06 TASK: Transcribe from recorded legal dictation/proceedings

PERFORMANCE OBJECTIVE: Given legal machine or shorthand dictation and recorded legal proceedings, prepare a transcript according to established format procedures and standards of mailability.

ENABLING OBJECTIVES:

1. Prepare a transcript from recorded machine dictation.
a. Prepare a clear space in which to work.
b. Prioritize the importance of the documents to be transcribed.
c. Use effective listening techniques during transcription and strive for continuous flow of information.
d. Keep dictionaries and references and format procedure manuals available.
e. Use care with sound-alike words, spelling, punctuation, capitalization, numbers, and word division.
f. Proofread carefully.
g. Assemble necessary copies along with envelopes for author's signature and approval.
h. Review statutes, court rules, or regulations for special mailing requirements, e.g., certified, registered, restricted, costs, etc.
i. Mail documents/materials if required.
j. Verify delivery if required.
k. Record and store media and file copy for future reference.
2. Prepare a transcript from shorthand dictation.
a. Keep a shorthand pad and pen or pencil handy.
b. Use recommended outlines and develop own shortcuts to simplify the note-taking process.
c. Develop system for inserting text and making corrections.

d. Date the bottom of each page before taking dictation.
e. Use colored pen or pencil to indicate such instructions as "rush" or "high priority."
f. Mark the end of an item with a special instruction such as a diagonal or back slash.
g. Record all instructions and clear up any questions about instructions with the dictator.
h. Follow transcription procedure as outlined in Enabling Objective No. 1 above.

16.07 TASK: Prepare and maintain legal records

PERFORMANCE OBJECTIVE: Given record-keeping responsibilities in the law office, open and maintain new client files, establish and maintain accurate record-keeping procedures for billing the client, maintain time records, and establish and maintain efficient files management procedures in accordance with standard office policy.

ENABLING OBJECTIVES:

1. Open and maintain new client files.
   a. Obtain a charge record or new matter report, which includes the following information:
      (1) Name of client.
      (2) Names of other parties when applicable.
      (3) Type of legal action.
      (4) Service performed by attorney.
      (5) Payments made by firm in conjunction with account.
   b. Prepare and document fee arrangement.
   c. Obtain necessary authorizations from client.
      (1) Identify the information needed, e.g., medical, employment, tax returns, etc.
      (2) Request and record information from client.
      (3) Identify other sources where information may be obtained.
      (4) Obtain signatures on authorizations and notarization when necessary.
      (5) Request and obtain information from other sources after obtaining authorizations.
   d. Keep client and file updated.
      (1) Review client file and note calendar notations.
      (2) Confirm telephone conversations and/or other oral communications with letter and/or memo to file.
      (3) Prepare or update file summary of case status.
      (4) Obtain instructions from supervising attorney as to method of contact.

(5) Contact client with information concerning court settings, decisions, and other relevant matters by telephone or by correspondence.
(6) Document client contact.

2. Establish record-keeping procedures to maintain an accurate financial record of charges, payments, and the balance of the client account.
   a. Identify the type of record keeping, e.g., calendar, checkbook, accounting ledger, etc.
   b. Schedule meeting with client to discuss record-keeping procedures.
   c. Provide client with record-keeping format.
   d. Monitor record keeping.
3. Maintain time records.
   a. Determine the format to be used.
   b. Record the following information on time record:
      (1) Case name and/or file number.
      (2) Date work performed.
      (3) Type of work performed.
      (4) Explanation of work performed.
      (5) Amount of time.
   c. Forward completed time records to persons or department responsible for accounting records.
4. Establish and maintain procedures for effective files management. (This responsibility may not be the responsibility of the legal secretary.)
   a. Fill out a new matter report properly.
   b. Run a conflict of interest check on each new file opened.
   c. Maintain a record of the location of every file in the office.
   d. Maintain a master index of all active and all closed files, including appropriate cross-index entries.
   e. Maintain a record of pertinent data of any files that are destroyed.
   f. Maintain a Rolodex file index for each attorney's secretary to track the flow of the files among the attorneys in the office.
   g. Conduct periodic checks of files in various attorneys' offices to verify the accuracy of the file records.
   h. Prepare and distribute weekly to all attorneys a new file memorandum listing all new files opened the preceding week.
   i. Maintain a docket/calendar control system.
   j. Keep written procedures current.

16.08 TASK: Identify the court in which legal documents should be filed

PERFORMANCE OBJECTIVE: Given a legal document and an understanding of standards established by the federal and state judicial system in the area being served, identify

the court in which it is to be filed by identifying the type of document to be filed, by determining the type of jurisdiction required by the court in order for it to handle the case, and by determining the venue of the case.

ENABLING OBJECTIVES:

1. Identify the federal, state, and local judicial branches of government in the area being served.
2. Define jurisdiction and identify the types of jurisdiction granted to the courts, e.g., original, subject matter, personam, in rem, limited, exclusive, monetary, concurrent, appellate, etc.
3. Identify the pleading and/or document to be filed.
4. Determine if the subject matter of the pleading and/or document is covered by state or federal law.
5. Determine the type of jurisdiction required by the case.
6. Define venue and describe its importance in determining where lawsuits are to be filed.
7. Identify office where pleading and/or document is to be filed and obtain the rules of procedure used in filing documents with that particular court.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 17 - PERFORM MEDICAL SPECIALTY ACTIVITIES

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

Each task describes an occupational activity which will result in a finished process or product. Such a process or product should always allow an evaluation using standards which address the operation, appearance, dimensions, time in which achieved, or similar characteristics. The tasks listed in each module represent the basic activities required of each student to demonstrate entry level competence for that specific system or field of study within business occupations.

The capability for providing instructional experiences and practical application of the tasks contained in each module will determine the scope of the business systems specialists. In this regard, the student's maturity and preparation to receive instructions well as the availability of equipment and the expertise of the instructional staff will be of primary importance. Individual records of student performance in completing the tasks listed within each module should be maintained.

Although some provision is made for basic mathematics and communication skills within these standards, they may not be adequate to meet the needs of individual students. Counseling, guidance, and diagnostic test results may indicate a need for further preparation in these areas. In such cases, instructors are encouraged to utilize the resources and personnel within the institution to improve or complement the instructional process.

It is the goal of this program standard to provide a level of instruction which will impart entry level employment skills. Students should be carefully counseled on the importance of attaining competency in the tasks assigned. As in virtually all occupations today, business systems specialists will require periodic up-dating and review in the future. It is important that each student understand that meeting the program standards is essential not only to obtain employment today but also to have a base upon which to retain employment in the future.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 17 - PERFORM MEDICAL SPECIALTY ACTIVITIES

17.0 PERFORM MEDICAL SPECIALTY ACTIVITIES--The student will be able to:

17.01 Demonstrate knowledge of medical terms
17.02 Demonstrate knowledge of anatomy, physiology, body systems and associated common diseases/conditions
17.03 Schedule office appointment(s)
17.04 Schedule hospital admissions, out-patient surgery, and ancillary testing
17.05 Maintain physician's on-call schedule
17.06 Schedule medical staff appointments and activities
17.07 Process patients/visitors
17.08 Assist patient to complete registration form(s)
17.09 Assemble/compile/activate patient's medical record/chart
17.10 Maintain patient's medical record folder
17.11 Process out-of-office examination, test or treatment information
17.12 Prepare laboratory requisition
17.13 Prepare packages for shipping/mailing
17.14 Code surgical, diagnoses and procedures
17.15 Complete insurance claim form(s)
17.16 Inventory supplies and equipment
17.17 Order supplies and equipment
17.18 Verify receipt of supplies and equipment
17.19 Store medical equipment and supplies
17.20 Schedule custodial and maintenance services
17.21 Process incoming telephone calls
17.22 Process outgoing telephone calls
17.23 Process incoming mail
17.24 Prepare correspondence for mailing
17.25 Compose correspondence
17.26 Transcribe dictation
17.27 Transcribe histories, notes, clinical resumes and reports into medical records
17.28 Prepare agendas
17.29 Take and transcribe minutes of meetings
17.30 Type manuscripts
17.31 Compose abstracts of articles and reports
17.32 Establish cross-reference index
17.33 Maintain alphabetical, numerical, and subject filing system
17.34 Arrange conferences
17.35 Make travel arrangements and prepare itinerary
17.36 Enter information into computer terminal
17.37 Retrieve information from computer terminal
17.38 Duplicate material(s) on copying machine

17.39 Prepare medical record(s) for microfilming
17.40 Process patient charge slips
17.41 Record payments
17.42 Prepare itemized statements
17.43 Control petty cash fund
17.44 Reconcile cash count and receipts
17.45 Prepare bank deposits
17.46 Process overdue accounts
17.47 Process accounts payable invoices
17.48 Prepare medical records for court
17.49 Maintain patient master (card) index file
17.50 Maintain manual/automated disease indexes
17.51 Maintain manual/automated surgical operations indexes
17.52 Maintain physical/confidential security of medical records
17.53 Enter medical records information on computer
17.54 Establish medical record filing system
17.55 Develop a policy/procedures manual
17.56 Maintain policy/procedures manual
17.57 File alphabetically and numerically
17.58 Orient and train employees/students
17.59 Develop/coordinate personnel continuing education opportunities

MODULE 17 - PERFORM MEDICAL SPECIALTY ACTIVITIES

17.01 TASK: Demonstrate knowledge of medical terms

PERFORMANCE OBJECTIVE: Given lists of component parts of medical terms and abbreviations, correctly fill in blanks and provide definitions. Utilizing word parts provided, correctly build medical terms.

ENABLING OBJECTIVES:

1. Correctly spell, pronounce and define prefixes.
2. Correctly spell, pronounce and define suffixes.
3. Differentiate between the singular and plural form and use the correct form appropriately.
4. Correctly spell and pronounce the singular and plural forms.
5. Correctly spell, pronounce and define word roots and combining forms.
6. Define medical abbreviations.
7. Create medical terms correctly spelled from selected prefixes, suffixes and combining forms.

17.02 TASK: Demonstrate knowledge of anatomy, physiology, body systems and associated common diseases/conditions

PERFORMANCE OBJECTIVE: Given anatomical charts, diagrams and symptoms of diseases/conditions correctly apply to appropriate body system.

ENABLING OBJECTIVES:

1. Label the major muscles and bones on a given diagram.
2. Describe the common signs and symptoms of a fracture, sprain and strain.
3. Differentiate between the various types of fractures.
4. Name the function of the musculoskeletal system.
5. Label the three layers of the skin on a given diagram.
6. Identify the common signs and symptoms of at least three integumentary system diseases/conditions.
7. Name the functions of the integumentary system.
8. Label the major organs of the digestive system on a given diagram.
9. Name two functions of the digestive system.
10. Identify the common signs and symptoms of at least three digestive system diseases/conditions.
11. Label the major organs of the endocrine system on a given diagram.
12. Name two functions of the endocrine system.
13. Identify the common signs and symptoms of at least three endocrine system diseases/conditions.
14. Label the major organs of the respiratory system on a given diagram.
15. Name two functions of the respiratory system.
16. Identify the common signs and symptoms of at least three respiratory system diseases/conditions.
17. Label the major organs of the circulatory system on a given diagram.
18. Trace the flow of blood through the heart.
19. Identify selected blood vessels.
20. Identify the common signs and symptoms of at least three circulatory system diseases/conditions.
21. Label the major parts of the brain, eye and ear on a given diagram.
22. Name three functions of the neurosensory system.
23. Identify the common signs and symptoms of at least three neurosensory system diseases/conditions.
24. Label the major parts of the urinary system on a given diagram.
25. Label the major parts of the reproductive system of the male and the female on given diagrams.
26. Identify the common signs and symptoms of at least six genitourinary system diseases/conditions.

17.03 TASK: <u>Schedule office appointment(s)</u>

PERFORMANCE OBJECTIVE: Given secretarial station and person to be scheduled, schedule office appointment(s). Appointments must be scheduled at times convenient for physician and patient. The time allotted must be based on type of appointment. The schedule must include patient's name, telephone number and reason for

appointment. Emergency appointments must be scheduled at earliest possible time for doctor and patient.

ENABLING OBJECTIVES:

Routine Appointments
1. Block out time slots when physician is not available.
2. Ask reason for appointment to determine available openings.
3. Ask preferred date and time.
4. Offer available appointment times. (NOTE: Be sure to allow sufficient time to cover type of appointment.)
5. Record mutually agreeable appointment including name, telephone number and reason for appointment.
6. If appointment is made by patient in person, fill out appointment card.
7. Give appointment card to patient.
8. If appointment is made over the telephone, confirm the date and time of the appointment, name of the patient, telephone number of the patient and reason for the appointment.

Emergency Appointments
1. Determine the nature of the emergency.
2. Direct patient to report to office/hospital emergency room immediately.
3. Inform physician.
4. Notify hospital emergency room.

17.04 TASK: Schedule hospital admissions, out-patient surgery, and ancillary testing

PERFORMANCE OBJECTIVE: Given patient to be scheduled, secretarial station, and physician's instructions, schedule hospital admissions, out-patient surgery, and ancillary testing. Appointment scheduled must be acceptable to patient, doctor, hospital, and ancillary testing units, and patient must receive complete instructions on preparation for procedure(s) to be performed.

ENABLING OBJECTIVES:

Hospital Admission
1. Call admitting office to schedule patient.
2. Give information about patient.
3. Obtain admission date and time.
4. Give patient admission information verbal and written.
   a. Date.
   b. Time and place of admission.
   c. Physician's instructions.
   d. Hospital admission requirements.

e. Record appointment in patient chart.

Out-patient Surgery
1. Call facility to schedule surgery and patient's admission.
2. Give information about patient.
3. Schedule surgery.
4. Give patient admission information verbal and written.
   a. Date.
   b. Time.
   c. Location and directions to facility.
   d. Doctor's instructions.
   e. Out-patient surgery instructions.
5. Record appointment in patient chart.

Ancillary Testing
1. Call testing department for appointment.
2. Give information about patient.
3. Obtain date and time for test(s).
4. Obtain patient instructions for test to be performed.
5. Record appointment in patient chart.
6. Give patient testing information/special information verbal and written.
   a. Date.
   b. Time.
   c. Location and directions to facility.

17.05 TASK: Maintain physician's on-call schedule

PERFORMANCE OBJECTIVE: Given secretarial station and copy machine, maintain physician's on-call schedule. Schedule must be accurate, current, free of conflicts, and must ensure continuity of patient care around-the-clock.

ENABLING OBJECTIVES:

1. Obtain on-call schedule from physician.
2. Type on-call schedule.
3. Make copies.
   a. Three copies for each hospital.
   b. One copy for the physician.
   c. One copy for the office nurse/clinical assistant.
   d. One copy for the administrative assistant
   e. Other copies as required.
4. Distribute copies to authorized personnel.
5. Post on-call schedule at secretarial station.
6. Write any changes on schedule.
7. Notify authorized personnel of changes.

17.06 TASK: Schedule medical staff appointments and activities

PERFORMANCE OBJECTIVE: Given secretarial station and list of medical staff activities, schedule medical staff appointments and activities. Each appointment/activity must be assigned to a physician and a time must be scheduled for the activity.

ENABLING OBJECTIVES:

1. Obtain physician's schedule.
2. Obtain date, time, and location of activities.
3. Record appointments/activities in appointment book blocking out time as necessary.
4. Type schedule.
5. Proofread schedule and make necessary corrections.
6. Give physician copy of schedule.
7. Post schedule.

17.07 TASK: Process patients/visitors

PERFORMANCE OBJECTIVE: Given secretarial station, patients' charts, and assorted forms, process patients/visitors in accordance with established policy. Patients/visitors must be welcomed, forms and charts up-dated, and delays explained.

ENABLING OBJECTIVES:

1. Greet patient(s)/visitors by name if possible.
2. Obtain patient's/visitor's name if necessary.
3. Complete necessary forms and start chart for new patients or up-date forms and charts for returning patients.
4. Answer questions and/or explain delays.
5. Direct patient to be seated or escort to physician office or examination room.
6. Leave patient chart in designated place for physician.
7. If a visitor, advise the physician of their name, location and purpose of visit.
8. Schedule appointment or emergency appointment for visitor requiring one.

17.08 TASK: Assist patient to complete registration form(s)

PERFORMANCE OBJECTIVE: Given registration forms and secretarial station, assist patient to complete registration form(s). Forms must contain required information and must be legible.

ENABLING OBJECTIVES:

1. Select form(s) to be completed.
2. Give form(s) to patient to complete.

3. Complete form(s) for patient requiring assistance:
   a. Ask questions.
   b. Write or type answers on form(s).
4. Obtain patient's/authorized signature on form(s).
5. Proofread form(s).
6. File form(s) in patient chart.

17.09 TASK: Assemble/compile/activate patient's medical record/chart

PERFORMANCE OBJECTIVE: Given patient registration form(s) and other medical record supplies, tools and equipment, assemble/compile/activate patient's medical record. A medical record folder will have been assembled/compiled/activated for patient(s) without error according to facility policy/procedure.

ENABLING OBJECTIVES:

1. Review facility policy/procedure for assembling/compiling/activating patient's medical records.
2. Secure/obtain registration form(s) for new patients.
3. Arrange registration forms in alphabetical/numerical order.
4. Retrieve patients' index cards from the patient index card file for returning patients. Type index care for new patients.
5. Assign chart number to all new patients.
6. Type information on patients' index cards or enter information into the computer. (Include: Medical record number for new patients, additions and/or corrections of identification information and health insurance information.
7. Prepare patient's medical record/chart folder. (Include: Patient's name, medical record number, color code, special tags/flags etc.)
8. Review contents and information on folders for completeness.
9. Obtain medical history from/for new patients.

17.10 TASK: Maintain patient's medical record folder

PERFORMANCE OBJECTIVE: Given patient(s) medical record folder(s), information to be added to the medical record, tools and equipment, maintain the patient's medical record folder. The patient(s) medical record folder(s) must be updated and maintained without error according to facility policy/procedures.

ENABLING OBJECTIVES:

1. Review facility policy/procedure for maintaining medical records.

2. Obtain/receive, prepare patient's medical record folder.
3. Verify/write/type identification information on folder. (Include patient's name, medical record number, color code, special tags/flags etc.)
4. Review for accuracy and completeness.
5. Obtain/review source documents/information.
6. Update medical history form(s) on any patient not seen within the previous two years.
7. Review entries for accuracy and completeness.
8. Insert/record updated information in medical record folder.
9. Forward/file medical record folder.

17.11 TASK: Process out-of-office examination, test or treatment information

PERFORMANCE OBJECTIVE: Given secretarial station, copy machine, medical record(s), and dictation, process out-of-office examination, test or treatment information. Patient's record of out-of-office examination or treatment must be complete; must be free of typographical, grammatical, spelling, punctuation, or content errors; and must be filed and distributed according to policy.

ENABLING OBJECTIVES:

1. Transcribe dictation in format specified.
2. Proofread transcription and correct errors.
3. Make required copies.
4. Insert original report or typewritten report into medical record.
5. Distribute copies of report(s) to authorized personnel.

17.12 TASK: Prepare laboratory requisition

PERFORMANCE OBJECTIVE: Given laboratory requisition, specimens, and patient's record, prepare laboratory requisition. Laboratory requisition must specify test(s) to be performed, date and time of specimen collection and method of collection, be complete, error-free and legible; and must be attached to the appropriate patient's specimen(s).

ENABLING OBJECTIVES:

1. Complete requisition form:
   a. Patient's full name.
   b. Tentative diagnosis or reason for test(s).
   c. Patient's address and telephone number.
   d. Patient's health insurance information required.
   e. Date, time and method of specimen collection.
   f. Date.

g. Test to be performed.
h. Physician's/facility name, address and telephone number.

2. Call laboratory for appointment, if procedure requires scheduling.
3. Attach requisition to specimen(s).
4. Send specimen(s) to laboratory.

17.13 TASK: Prepare packages for shipping/mailing

PERFORMANCE OBJECTIVE: Given material/specimens to be shipped/mailed, containers, wrapping paper, strapping tape, labels, postage scale, scissors, and postage, prepare packages for shipping/mailing. Packages must be wrapped and shipped/mailed according to postal or other carrier's regulations, and label must bear complete and legible address.

ENABLING OBJECTIVES:

1. Laboratory specimen(s) must be placed in primary protective container(s).
2. Place material in shipping/mailing container along with requisition etc.
3. Add packing fill, if necessary.
4. Wrap or tape container according to postal/shipper regulations.
5. Address label.
6. Attach label.

17.14 TASK: Code surgical, diagnoses and procedures

PERFORMANCE OBJECTIVE: Given patient's uncoded records (charts), tools and equipment, code surgical operations, diagnoses and procedures. All codes used must be "acceptable".

ENABLING OBJECTIVES:

1. Examine patient records for items to be coded.
2. Define/delineate items to be coded.
   a. Diagnosis/diagnoses.
   b. Surgical operation(s).
   c. Procedure(s).
   d. Supplementary.
3. Identify code for item to be coded by consulting appropriate code manual.
4. Record code on patient's permanent medical record folder. Input computer information where necessary.
5. Check codings for accuracy, legibility, sequencing and completeness.
6. Route/return/file record folder.

17.15 TASK: Complete insurance claim form(s)

PERFORMANCE OBJECTIVE: Given secretarial station, patient's file, blank insurance form(s), and computer, complete insurance claim form(s). Form(s) must contain accurate information; must be signed by patient and physician; and all questions must be answered.

ENABLING OBJECTIVES:

By typewriter

1. Insert form in typewriter.
2. Make typewriter adjustments:
   a. Set margins.
   b. Set tabs.
   c. Adjust line-space regulator.
   d. Adjust paper-bail rolls.
3. Read insurance claim form.
4. Refer to patient's file for information requested on the claim form.
5. Type information onto form.
6. Answer all questions on form.
7. Proofread form.
8. Correct errors.
9. Submit form for physician's/authorized signature.
10. Photocopy form.
11. File photocopy of form in patient's record.
12. Mail original to insurance company.
13. File patient record.
14. Record name of insurance company and date billed on patient ledger.

By computer

1. Select form.
2. Read insurance claim form.
3. Refer to patient's file for information requested on the claim form.
4. Input information onto form.
5. Answer all questions on form.
6. Proofread form.
7. Correct errors.
8. Print out two copies of form.
9. Submit for physician's/authorized signature.
10. File copy of form in patient's record.
11. Mail original to insurance company.
12. File patient record.
13. Input name of insurance company and date billed on patient ledger.

17.16 TASK: Inventory supplies and equipment

PERFORMANCE OBJECTIVE: Given supplies, equipment, and blank inventory form, inventory supplies and equipment. Inventory must include number, type, serial/model number

and condition of all supplies and equipment on hand as of the date specified on the inventory.

ENABLING OBJECTIVES:

1. Record date of inventory.
2. Compile/obtain list(s) of office supplies and equipment.
3. Count and record supplies on hand.
4. Count and record equipment on hand.
5. Report condition of equipment in obvious need of repair.

17.17 TASK: Order Supplies and equipment

PERFORMANCE OBJECTIVE: Given list of supplies/equipment to be ordered, supply catalogs, and purchase order, order supplies and equipment. Supplies/equipment ordered must meet specifications; expenditures must be within budget; all items on purchase order must be complete and error free; purchase order must have authorized signature before forwarding to supplier.

ENABLING OBJECTIVES:

1. Refer to supply catalog on previous purchase order for ordering information.
2. Type information on purchase order.
3. Proofread purchase order.
4. Obtain authorized approval/signature.
5. Forward purchase order to supplier.

17.18 TASK: Verify receipt of supplies and equipment

PERFORMANCE OBJECTIVE: Given newly-arrived supplies and equipment, and purchase order, verify receipt of supplies. All discrepancies and/or damages must be accurately recorder and vendor/shipper must be notified promptly.

ENABLING OBJECTIVES:

1. Open package(s).
2. Compare supplies/equipment received with purchase order for:
   a. Quantity.
   b. Quality.
   c. Specifications.
   d. Condition.
   e. Cost.
3. Record any discrepancies or damages on invoice.
4. Notify vendor/shipper of discrepancies/damages.
5. Replace damaged or incomplete orders in original container.

6. Store materials ordered for return to vendor/shipper.

17.19 TASK: Store medical equipment and supplies

PERFORMANCE OBJECTIVE: Given medical equipment and supplies, storage cabinets, and labels, store medical equipment and supplies. Medical equipment and supplies must be stored in their assigned area with provision for access and rotation of supplies.

ENABLING OBJECTIVES:

1. Plan utilization of storage area.
2. Sort equipment and unmarked supplies.
3. Label storage area(s).
4. Arrange equipment and supplies according to plan.
5. Store new supplies behind older supplies discarding out-of-date item(s).

17.20 TASK: Schedule custodial and maintenance services

PERFORMANCE OBJECTIVE: Given office to be maintained and custodial/maintenance personnel, schedule custodial and maintenance services. Custodial and maintenance services must be scheduled before or after office hours and in accordance with the need for each service.

ENABLING OBJECTIVES:

Custodial Services
1. List services to be performed.
2. Determine how often each service must be performed.
3. Write schedule of daily, weekly, monthly services.
4. Make two photocopies of schedule.
5. Give one copy of schedule to custodial personnel.

Maintenance (Repair) Services
1. Determine nature of repair.
2. Call repair personnel and describe problem.
3. Request estimated cost of repair.
4. Obtain final approval from authorized individual, if necessary.
5. Call repair personnel and set date and time for repair.

17.21 TASK: Process incoming telephone calls

PERFORMANCE OBJECTIVE: Given secretarial station and telephone message pad, process incoming telephone calls. Incoming calls must be answered within ten (10) seconds or within three (3) rings; office and individual answering must be identified; mouthpiece must be held no more than one (1) inch from mouth; progress reports must be given once a minute to callers placed on "hold";

messages recorded must be accurate, complete, and verified.

ENABLING OBJECTIVES:

1. Answer telephone promptly.
2. Greet caller and identify office and self.
3. Obtain identity of caller.
4. Ask nature of call.
5. Process call in one of the following ways:
   a. Transfer call.
   b. Provide information, if permissible.
   c. Record and deliver message.
   d. Place caller "on hold."
   e. Furnish progress reports to callers "on hold."
6. Terminate call.
7. Thank person for calling.
8. Say goodbye pleasantly.
9. Hang up gently.

17.22 TASK: Process outgoing telephone calls

PERFORMANCE OBJECTIVE: Given secretarial station, call(s) to be placed, office directory, telephone directory and long-distance telephone log, process outgoing telephone calls. Outgoing calls must provide person being called with name of caller, office, and purpose of call; mouthpiece must be held no more than one (1) inch from mouth; progress reports must be given to persons placed on "hold"; all information given/obtained must be verified; and all long-distance calls must be recorded in log.

ENABLING OBJECTIVES:

1. Plan call.
2. Obtain number:
   a. From office directory.
   b. From telephone directory.
   c. From long-distance telephone log.
   d. From information operator.
3. Place call:
   a. Dial local call.
   b. Dial long-distance call:
      (1) Direct-distance dial.
      (2) Person-to-person.
      (3) Conference calls.
      (4) Overseas calls.
4. Identify yourself and your office courteously and distinctly.
5. Explain purpose of call.
6. Relay/obtain information.
7. Verify information.
8. Terminate call.
9. Say goodbye pleasantly.

10. Hang up gently.
11. Record call in long-distance call log.
12. Report wrong numbers reached to operator for credit.

17.23 TASK: Process incoming mail

PERFORMANCE OBJECTIVE: Given secretarial station, date stamp, and incoming mail, process incoming mail. Mail must be promptly distributed to addressee or person responsible for further processing.

ENABLING OBJECTIVES:

1. Sort unopened mail:
   a. Business.
   b. Personal.
2. Open all but "confidential" mail.
3. Stamp each piece of mail with date.
4. Mend torn or damaged mail.
5. Attach enclosures to mail.
6. Record any missing enclosures on mail.
7. Route mail.

17.24 TASK: Prepare correspondence for mailing

PERFORMANCE OBJECTIVE: Given correspondence, addressed envelopes, postage scale, zip code directory, postage meter, U.S. postal manual, and postage, prepare correspondence for mailing. Correspondence must bear complete and accurate address; enclosures, if any, must accompany correspondence; mail must be folded to fit envelope, and sealed.

ENABLING OBJECTIVES:

1. Verify address on document and corresponding envelope.
2. Check that all enclosures are present.
3. Fold correspondence to fit envelope.
4. Insert correspondence into envelope.
5. Seal envelope.
6. Weigh envelope and meter with correct postage or place correct number of postage stamps.

17.25 TASK: Compose correspondence

PERFORMANCE OBJECTIVE: Given secretarial station and related documents, compose correspondence. Correspondence must be typed in specified format and must be free of spelling, punctuation, grammatical and typographical errors.

ENABLING OBJECTIVES:

1. Determine purpose of letter.
2. Organize and verify related documents.
3. Write draft:
   a. State purpose.
   b. State details.
   c. State desired action.
4. Proofread draft.
5. Correct errors.
6. Retype if necessary.
7. Proofread.
8. Submit for signature.

17.26 TASK: Transcribe dictation

PERFORMANCE OBJECTIVE: Given secretarial station and dictation, transcribe dictation. Dictation must be accurately transcribed; typed in format specified; and must be free of spelling, punctuation, grammatical and typographical errors.

ENABLING OBJECTIVES:

1. Take or obtain dictation.
2. Type dictation in format specified.
3. Proofread typed copy.
4. Correct errors.
5. Retype if necessary.
6. Submit final copy to dictator.

17.27 TASK: Transcribe histories, notes, clinical resumes and reports into medical records

PERFORMANCE OBJECTIVE: Given secretarial station, dictated material, medical record, and specified formats; transcribe recorded dictation into medical records. Medical report must contain all dictated information on patient and must be typed in format specified without errors in content, spelling, punctuation, grammar, or typing.

ENABLING OBJECTIVES:

1. Take shorthand notes or insert dictation medium into transcription machine.
2. Make typewriter/computer adjustments:
   a. Set margins.
   b. Set tabs.
   c. Set line spacing.
3. Type information according to specified format.
4. Proofread.
5. Correct errors.
6. Submit typed copy to supervisor for review if required.

7. List/record completion of report in control file/ledger.
8. Route/submit/forward report according to facility policy/procedures.

17.28 TASK: Prepare agendas

PERFORMANCE OBJECTIVE: Given secretarial station, details of meeting, and specified format, prepare agendas. Agendas must provide details of meeting in specified format and must be error free.

ENABLING OBJECTIVES:

1. Prepare draft of agenda:
   a. Name of meeting.
   b. Date and time.
   c. Location.
   d. Topics to be discussed and speakers.
2. Submit draft of agenda to supervisor for review, revisions and/or approval.
3. Type final copy.
4. Proofread final copy.
5. Correct all errors.
6. Submit final copy to supervisor for approval.
7. Duplicate sufficient copies for persons invited.
8. Distribute copies to those invited.

17.29 TASK: Take and transcribe minutes of meetings

PERFORMANCE OBJECTIVE: Given secretarial station, scheduled meeting and specified format, take and transcribe minutes of meetings. Minutes must include names of those in attendance; report all proceedings in order of occurrence and must include those in attendance and exact wording of all motions or resolutions as well as name of individual proposing and seconding and outcome (pass/fail/table).

ENABLING OBJECTIVES:

1. Record attendance.
2. Record events of meeting in chronological order.
3. Record exact wording of all motions and resolutions, names of those making and seconding motions, and vote or result.
4. Type rough draft of minutes.
5. Proofread draft; compare draft against agenda.
6. Submit draft to supervisor for review if required.
7. Type final copy in specified format.
8. Proofread final copy.
9. Make necessary copies.
10. Distribute as required.

17.30 TASK: Type manuscripts

PERFORMANCE OBJECTIVE: Given secretarial station and rough draft of manuscript, type manuscript. Manuscript must be typed in specified format so that:

1. The copy contains no typographical, spelling, punctuation, or grammatical errors.
2. Format and style conforms to publisher's policy.
3. The copy is legible.
4. No smudges or extraneous marks are present.

ENABLING OBJECTIVES:

1. Read rough draft of manuscript.
2. Edit and/or correct grammatical, spelling, punctuation errors, sentence structure and typographical errors.
3. Make typewriter/computer adjustments:
   a. Set margins as specified by publisher.
   b. Set tabs.
   c. Set line spacing to double-space (NOTE: Single-space quoted material).
4. Type manuscript in specified format.
5. Proofread manuscript.
6. Correct errors.
7. Retype if necessary.
8. Submit typed manuscript to originator.

17.31 TASK: Compose abstracts of articles and reports

PERFORMANCE OBJECTIVE: Given secretarial station and material to abstract, compose abstracts of articles and reports. Abstract must summarize important points in clear and concise language; must not exceed one typewritten page; and must include source and page numbers of article or report from which it is taken.

ENABLING OBJECTIVES:

1. Gather articles and reports.
2. Read material.
3. Outline important points.
4. Summarize important points.
5. Record source:
   a. Author.
   b. Title of article/report.
   c. Place of publication.
   d. Date of publication.
   e. Publisher.
   f. Page number(s).

17.32 TASK: Establish cross-reference index

PERFORMANCE OBJECTIVE: Given secretarial station, blank cross-reference sheets/cards, documents, file folders, and labels, establish cross-reference index. Cross-reference index must provide exact location of materials under all related headings.

ENABLING OBJECTIVES:

1. Sort documents.
2. Index, code and determine need for cross-referencing.
3. Fill in cross-reference sheet/card.
   a. Name or subject.
   b. Date of document.
   c. Brief description of content of original document or photocopy of original.
   d. Location of original.
4. Label file folder.
5. File original document.
6. File cross-reference sheet/card.

17.33 TASK: Maintain alphabetical, numerical, and subject filing system

PERFORMANCE OBJECTIVE: Given file folders, labels, file cabinet, material to be filed, and cross-reference sheets/cards, maintain alphabetical, numerical, and subject filing system. Filing system must be organized; material must be filed in chronological order with most recent date to the front; and there must be room for expansion and working space within the files.

ENABLING OBJECTIVES:

1. Check documents for release for filing.
2. Index and code documents.
3. Sort documents.
4. Prepare cross-reference sheets/cards if necessary.
5. File documents according to established system.
6. File cross-reference sheets/cards.
7. Retain or discard documents according to established policy.
8. Break overcrowded folder, if necessary.
9. Transfer folders to inactive files, as directed.

17.34 TASK: Arrange conferences

PERFORMANCE OBJECTIVE: Given secretarial station and conference to be arranged, arrange conference. Conference must be arranged in room with facilities to accommodate all participants; all equipment, supplies,

and meals/refreshments must be reserved/ordered; and all participants must be notified.

ENABLING OBJECTIVES:

1. Obtain details of conference:
   a. Title.
   b. Date.
   c. Time.
   d. Location.
   e. Participants.
2. Contact speaker(s), if necessary.
3. Reserve meeting room.
4. Make reservations for meals.
5. Order refreshments.
6. Reserve audio-visual aids.
7. Type draft of meeting notice.
8. Submit draft for approval.
9. Type final copy of meeting notice.
10. Mail/distribute meeting notices.
11. Record acceptances or regrets.
12. Prepare agenda.
13. Mail/distribute agenda.

17.35 TASK: Make travel arrangements and prepare itinerary

PERFORMANCE OBJECTIVE: Given details of trip and secretarial station, make travel arrangements and prepare itinerary. Travel arrangements must be made so that rooms are reserved, transportation tickets are obtained, travel funds are secured, car rentals are arranged, and an itinerary is prepared.

ENABLING OBJECTIVES:

1. Obtain details of trip:
   a. Date of departure.
   b. Places to be visited.
   c. Date of return.
   d. Mode of transportation.
   e. Accommodations preferred.
   f. Visa/passport/immunization requirements, if foreign travel.
2. Call for transportation time schedules and rates.
3. Discuss transportation schedules with supervisor.
4. Make transportation reservation(s).
5. Request confirmation of reservation.
6. Reserve hotel/motel accommodations:
   a. Type of accommodations - single room, suite, etc.
   b. Rate, including any discounts offered.
   c. Number of persons in party.
   d. Date and approximate time of arrival.
   e. Length of stay.
   f. Credit card confirmation number.

7. Request confirmation of reservation.
8. Requisition advance according to office policy.
9. Prepare itinerary.
10. Pick up transportation tickets, if not mailed.
11. Check accuracy of transportation tickets.
12. Make copies of itinerary as required.
13. Distribute copies of itinerary as required.

17.36 TASK: Enter information into computer terminal

PERFORMANCE OBJECTIVE: Given specific information, and computer terminal, enter information into computer terminal. All information must be entered into computer without error and all entries must be accepted by the computer.

ENABLING OBJECTIVES:

1. Turn computer terminal "On."
2. Enter identification number.
3. Enter security password if required.
4. Select function.
5. Enter data according to system instructions.
6. Enter request for terminal disconnect.
7. Turn computer terminal "Off."

17.37 TASK: Retrieve information from computer terminal

PERFORMANCE OBJECTIVE: Given request for information and computer terminal, retrieve information from computer terminal. Information retrieval must provide complete and accurate answer to request.

ENABLING OBJECTIVES:

1. Turn terminal "On."
2. Enter identification number.
3. Enter security password if required.
4. Select function:
   a. Printed report.
   b. Display.
   c. Block.
5. Enter date and time to identify on-line function.
6. Read information to answer request.
7. Enter request for terminal disconnect.
8. Turn terminal "Off."
9. Tear off printed report, if provided.

17.38 TASK: Duplicate material(s) on copying machine

PERFORMANCE OBJECTIVE: Given original materials and copy machine, duplicate material(s) on copying machine. Duplicates must be legible and all printed matter on original must be reproduced on copy.

ENABLING OBJECTIVES:

1. Turn machine "On."
2. Set machine for desired number of copies.
3. Check paper size and supply.
4. Insert original according to operating instructions on copy machine.
5. Print copy.
6. Check quality of copy.
7. Adjust to lighten or darken copy if necessary.
8. Reprint copy, if necessary.
9. Check copy.
10. Set machine for desired number of copies.
11. Print copies.
12. Check copies.
13. Collect copies.
14. Collect original.
15. Turn machine "Off."

17.39 TASK: Prepare medical record(s) for microfilming

PERFORMANCE OBJECTIVE: Given secretarial station, microfilm log, and medical record, prepare medical record for microfilming. Medical record must contain forms in exact sequence specified by agency; must be free of blank sheets and duplicates; and log must contain complete medical record number, full name of patient, and date record was sent to be microfilmed.

ENABLING OBJECTIVES:

1. Remove staples, fasteners from medical record.
2. Check order of forms in medical record.
3. Remove blank sheets and duplicate forms from medical record.
4. Check forms for patient name and medical record number.
5. Write medical record number, name of patient and date sent for microfilming in log.

17.40 TASK: Process patient charge slips

PERFORMANCE OBJECTIVE: Given secretarial station, blank charge slip, patient(s) ledger daily record, and code books, process patient charge slip(s). Charge slip must contain charges for all services rendered; balance due must reflect any payment made; and all payments/charges/codes must be entered in daily record.

ENABLING OBJECTIVES:

1. Write patient's name and date on charge slip.
2. Attach charge slip to patient's record.
3. Record amounts and code numbers on charge slip after physician has indicated services rendered.
4. Total charge slip.

5. Record next appointment on charge slip.
6. Record next appointment on appointment calendar.
7. Obtain patient signature on insurance form(s) as needed.
8. Issue receipt to patient.

17.41 TASK: Record payments

PERFORMANCE OBJECTIVE: Given secretarial station, computer, patient ledger(s), and daily record, record payments. Entries must be complete and error-free; all payments received must be recorded on both daily record and patients' ledger(s); balances on patients' ledger(s) must reflect all payments received. Entries made on computer to the patients' ledger(s) will automatically transfer to the daily record.

ENABLING OBJECTIVES:

1. Enter date in patient's ledger.
2. Enter source of patient i.e.:
   a. Cash.
   b. Personal check.
   c. Insurance company check.
3. Enter amount paid in "Credits" column on the patient ledger.
4. Subtract amount of payment from any outstanding balance.
5. Enter new balance on patient ledger(s).

17.42 TASK: Prepare itemized statements

PERFORMANCE OBJECTIVES: Given patient's ledger(s), secretarial station, computer, and copy machine, prepare itemized bills. Itemized bill must list charges and payments for all services rendered and must be mathematically correct and must contain required procedure and diagnostic codes.

ENABLING OBJECTIVES:

1. Verify information on patient ledger(s):
   a. Name of person being billed.
   b. Name of person to whom services were rendered.
   c. Address.
   d. Patient number.
   e. Date of each service.
   f. Service rendered.
   g. Procedure/diagnostic code.
   h. Charges.
   i. Credits.
   j. Total of all charges.
   k. Balance(s).
2. Photocopy patient ledger(s) or obtain computer print-out.

3. Type or print-out envelope or insert bill in window envelope.
4. Seal envelope.

17.43 TASK: Control petty cash fund

PERFORMANCE OBJECTIVE: Given petty cash fund, petty cash vouchers, petty cash record, control petty cash fund. Amount of petty cash on hand plus total of vouchers must equal original amount of fund.

ENABLING OBJECTIVES:

1. Determine amount to be maintained in petty cash fund.
2. Write petty cash voucher prior to each disbursement:
   a. Date.
   b. Amount.
   c. Paid to.
   d. Purpose.
   e. Signature.
3. Attach receipt to voucher, if available.
4. Record transactions in petty cash record book, if used.
5. Balance record when funds get low.
6. Prepare summary report of payments made.
7. Record or computer input total daily payouts on day sheet.
8. Write check to replenish fund.
9. Submit check for authorized signature.
10. Cash check to replenish fund.
11. File records.

17.44 TASK: Reconcile cash count and receipts

PERFORMANCE OBJECTIVE: Given cash, checks, patients' receipts, computer/calculator, pad, and pencil, reconcile cash count and receipts. Total cash and checks on hand must equal total of patients' receipts.

ENABLING OBJECTIVES:

1. Count cash.
2. Record total cash.
3. Add checks.
4. Record total checks.
5. Total cash and checks.
6. Total patients' receipts.
7. Compare totals.
8. Repeat steps 1-7, if totals do not match.

17.45 TASK: Prepare bank deposits

PERFORMANCE OBJECTIVE: Given blank deposit slips, checks, currency, coin, day sheet, and pen, prepare bank

deposits. Amount to be deposited must equal total of cash and checks on deposit slip, and each check must be listed separately.

ENABLING OBJECTIVES:

1. Write date on deposit slip.
2. Separate checks from cash.
3. Endorse checks.
4. Count currency.
5. Write total currency on deposit slip.
6. Count coin.
7. Write total coin on deposit slip.
8. List each check on deposit slip by bank number.
9. List money orders, traveler's checks, or bank drafts under "Checks" on slip.
10. Add checks, currency, and coin.
11. Verify with payments received column of daysheet. Totals should be equal.
12. Record total on deposit slip.

17.46 TASK: Process overdue accounts

PERFORMANCE OBJECTIVE: Given secretarial station and patient ledgers, process overdue accounts. An attempt must be made to collect every past-due account in accordance with office policy and length of time account is past-due.

ENABLING OBJECTIVES:

1. Identify overdue accounts.
2. Age overdue accounts.
3. Select collection method based on previous attempts to collect account:
   a. Send statement marked "Overdue".
   b. Send letter.
   c. Telephone patient at home.
   d. Refer account to physician.
   e. Send account to collection agency.
      (1) Input information on patient ledger giving:
         (a) Date.
         (b) Name of agency.

17.47 TASK: Process accounts payable invoices

PERFORMANCE OBJECTIVE: Given accounts payable invoices, journal, calculator, accounts payable ledgers, pen, and blank checks, process accounts payable invoices. Invoices must be verified, recorded and paid within discount period and all amounts entered must be accurate.

ENABLING OBJECTIVES:

1. Verify goods or services received with invoice(s).
2. Verify extensions and total.
3. Record invoice in journal.
4. Post entry to accounts payable ledger.
5. Write due date on invoice.
6. Sort invoices according to payment date.
7. File invoice in unpaid invoice file.
8. Remove invoices to be paid from file prior to expiration of discount period.
9. Calculate discount.
10. Calculate amount of payment.
11. Write check.
12. Record check number, date paid and initials on invoice.
13. Attach copy of invoice to check.
14. Obtain authorized signature on check.
15. Mail payment.
16. Write journal entry from copy of invoice.
17. Post payment to accounts payable ledger.
18. File paid invoice.

17.48 TASK: Prepare medical records for court

PERFORMANCE OBJECTIVE: Given appropriate supplied and equipment and request and authorization/court order, for certified copy of medical record, and complete medical records correctly prepare medical records for court. The copies of medical records needed for court purpose must be prepared in accordance with governmental laws/codes/regulations and facility policy/procedures.

ENABLING OBJECTIVES:

1. Review facility policy/procedures for preparing medical records for court/legal review.
2. Verify request for certified copy and/or authorization/court order for requested information.
3. Obtain/retrieve medical record and replace with outguide.
4. Analyze record for completeness and reproductibility.
5. Remove any administrative reports (insurance reports, social histories, etc.). Notify persons in accordance with facility policy/procedures.
6. Photocopy medical record(s) for the court or legal review. (NOTE: Some legal directives may require original medical records only. Keep track of charges.
7. List all pages of the medical record that were copied and total number of pages.
8. Evaluate copy for legibility and completeness.
9. Prepare/obtain any required certifying, or notarizing statement.

10. Have the certification notarized by Notary Public.
11. Prepare folder/envelope for certified copy of medical record.
12. Assure security of empty folder with the log of pages photocopied, copy of request/authorization/court order and all other forms.
13. Forward/return/file original medical record(s).
14. Forward/submit certified copy of medical record and charges to address listed on the request/authorization/court order.

17.49 TASK: Maintain patient master (card) index file

PERFORMANCE OBJECTIVE: Given patient information, index cards, secretarial station; type, verify and file patient's master index card. The patient's master index card must contain information in accordance with facility policy/procedures and filed without error for retrieval.

ENABLING OBJECTIVES:

1. Determine patient's status.
2. Type new index card for new patient in accordance with facility policy/procedure for the master card index file or enter information on computer.
3. Update index card for returning patient(s).
   a. Retrieve index card from master index card file.
   b. Type information on index file card or enter information on computer according to facility policy/procedure.
4. File card in master index card file according to facility filing policy/procedure.
5. Assure security of patient master index file according to facility policy/procedure.
6. Audit patient master index file for misfiles.

17.50 TASK: Maintain manual/automated disease indexes

PERFORMANCE OBJECTIVE: Given patient(s) medical record(s) with disease diagnoses, tools and equipment; maintain manual/automated disease indexes. The disease indexes must be completed without error and controlled and filed/stored for retrieval according to facility policy/procedures.

ENABLING OBJECTIVES:

1. Review facility policy/procedures for disease indexing.
2. Receive/obtain patient(s) medical record folder.
3. Code the summary sheet according to facility policy/procedures.
4. Record codes/information on to card/abstract forms according to facility policy/procedures.

a. Manual. Prepare separate disease index card for each disease category with all the information required by the facility on the card. Record all cases with the same disease/diagnosis on corresponding disease index form.
b. Automated. Record information onto computer abstract form(s).

5. Prepare/maintain indexing control list of all medical records indexed.
6. Return/route/file/store patient(s) medical record folder.
7. Process/store disease index cards/abstracts.
   a. Manual. File disease index cards in numerical order according to diagnosis code. Keep/secure according to facility policy/procedures.
   b. Automated. Submit abstracts to computer. Obtain computer output report(s) of disease indexes and place in notebook/binder. Keep/secure according to facility policy/procedures.

17.51 TASK: Maintain manual/automated surgical operations indexes

PERFORMANCE OBJECTIVE: Given patient(s) medical records with surgical operation(s), tools and equipment, maintain manual/automated surgical operations indexes. The surgical operations indexes must be completed without error, and controlled and filed/stored for quick retrieval according to facility policy/procedures.

ENABLING OBJECTIVES:

1. Review facility policy/procedures for surgical operations indexing.
2. Receive/obtain patient(s) medical record/folder.
3. Code the summary sheet according to facility policy/procedures.
4. Record codes/information onto card/abstract form according to facility policy/procedures.
   a. Manual. Prepare separate surgical operations index card for each operation performed with all the information required by the facility on the card. Record all cases with same surgical operation on corresponding surgical index card.
   b. Automated. Record the surgical information/codes onto the computer abstract form.
5. Prepare/maintain indexing control list of all patient(s) medical records indexed.
6. Return/route/file/store patient(s) medical record/folder.
7. Process/store surgical operations index cards/abstracts.

a. Manual. File surgical operation index cards in numerical order according to surgical operations code. Keep/secure according to facility policy/procedure.
b. Automated. Submit abstracts to computer. Obtain computer output report of surgical operations indexes and place in notebook/binder. Keep/secure according to facility policy/procedures.

17.52 TASK: Maintain physical/confidential security of medical records

PERFORMANCE OBJECTIVE: Given patient(s) medical records, tools and equipment; maintain physical/confidential security of medical records. All medical records must be either under direct surveillance or in locked storage. Access to medical records is only by authorized personnel, through legal order, or by written consent.

ENABLING OBJECTIVES:

1. Review facility policy/procedures for maintaining medical record security/confidentiality.
2. Receive/obtain patient(s) medical record/folder. (CAUTION: Trace/report lost records immediately upon detection of lost record.)
3. Verify patient's written consent and signature to release information. (NOTE: Records of patients with mental illness, developmental disabilities and/or drug or alcohol abuse are treated must more confidentially than other medical procedures, and extraordinary means must be taken to preserve their privacy.
4. Put patient(s) medical record(s) in safe/secure place under continuous surveillance by authorized personnel or under lock and key.
5. Supply/release information only to authorized personnel as per facility policy/procedures and/or written consent of patient, court order, subpoena or statute.
6. Protect medical record(s) from damage/defacement.
7. Place medical record(s) in locked cabinets/rooms.

17.53 TASK: Enter medical records information on computer

PERFORMANCE OBJECTIVE: Given a patient's completed medical record, specifications of information to be entered on/processed by computer, tools and equipment, enter medical record information on computer. The computer printout(s) must indicate the specified information without error.

ENABLING OBJECTIVES:

1. Obtain/receive a completed medical record.
2. Code entries on medical record using code books.
3. Enter information onto the computer abstract according to facility policy/procedures for the computer abstract.
4. Submit completed computer abstract/data for eying into the computer.
5. Receive/obtain the computer output reports (include: physicians index, disease index, surgical index, patient listing and death listing).
6. Insert computer output reports into notebook(s)/binder(s) for quick reference.
7. Assure security/protection/surveillance of computer output binder(s).

17.54 TASK: Establish medical record filing system

PERFORMANCE OBJECTIVE: Given medical records, tools and equipment; establish a medical record filing system. The medical record filing system must provide for medical record filing/storage, protection, surveillance, retrieval in accordance with governmental laws/codes/regulations, accreditation standards and/or facility policy/procedures.

ENABLING OBJECTIVES:

1. Review facility goals/plans for filing space needs.
2. Review governmental, accrediting agency and/or facility specifications for medical record files, control, security, lighting, supplies and safety.
3. Evaluate different types of filing equipment and supplies available.
4. Determine organizational pattern for files.
    a. Centralized.
    b. Decentralized.
5. Determine type of file equipment to install, e.g., open shelves, file drawer cabinets, automated, mechanical.
6. Determine type of record filing system to be used, e.g., numerical or alphabetical.
7. Assure approval from supervisor.
8. Obtain/order/purchase medical record filing equipment/supplies.
9. Have equipment installed.
10. Label/re-label medical records according to type of system to be used.
11. Index/cross-index according to facility policy/procedures.
12. Place labeled medical records in the installed files.
13. Update facility policy/procedures to accommodate operation of filing system.

17.55 TASK: Develop a policy/procedures manual

PERFORMANCE OBJECTIVE: Given specifications of a new facility policy/procedures, tools and equipment; develop a policy/procedures manual. The manual must contain policies to implement all facility functions and procedures to accomplish all facility policies, functions and activities in a coordinated organized logical manner without duplication of time-space.

ENABLING OBJECTIVES:

1. Review:
   a. Governmental laws/codes/regulations.
   b. Facility functions/activities.
   c. Facility job/position descriptions.
   d. Current facility policies/procedures and staff by-laws/rules/regulations.
2. Cluster facility functions/activities, job/positions, policies and regulations into sections.
3. Identify functions, activities, responsibilities needing a facility policy.
4. Identify/develop format for policies/procedures.
5. Develop draft of policy(s) to include chart of organization.
6. Draft procedures for each policy. (Include who, what, when, how, why for each procedure.)
7. Edit for duplication, conflicting statements, completeness.
8. Review draft with supervisor.
9. Review and retype as necessary.
10. Finalize copy.
11. Submit to supervisor for approval.
12. Duplicate required number of copies.
13. Forward/submit/distribute/file.

17.56 TASK: Maintain policy/procedures manual

PERFORMANCE OBJECTIVE: Given a new statutory regulation, accreditation standard, or facility function, tools and equipment, maintain the policy/procedures manual. All existing policies affected must be identified and revised. New policies must be developed for portions of the law not already addressed. The updated material(s) must be available to staff at least one week prior to the effective date of the law. The facility policy/procedures manual must contain current policies and procedures to reflect all current governmental laws/codes/regulations in accordance with facility policies/procedures.

ENABLING OBJECTIVES:

1. Review/analyze new governmental laws/codes/regulations accreditation standards, staff by-laws and regulations.
2. Research the effects of this law/code/standard in facility.
3. Identify the policy(s)/procedure(s) affected by the new law/code/standard.
4. Check for completeness, duplication, conflicts.
5. Draft a revised policy/procedure or substitution to meet new requirements.
6. Review draft with supervisor.
7. Revise draft if necessary.
8. Finalize policy/procedures.
9. Make copies as necessary.
10. Forward/submit/file according to facility policy/procedures.
11. Retain/file old policy/procedures according to facility policy/procedures.

17.57 TASK: File alphabetically and numerically

PERFORMANCE OBJECTIVE: Given documents to be filed alphabetically and numerically (index cards or patients' medical records), tools and equipment, file alphabetically and numerically. The documents must be filed alphabetically and numerically without error according to facility policy/procedures.

ENABLING OBJECTIVES:

1. Review facility policy/procedures for filing.
2. Assemble/sort items to be filed.
3. Arrange in alphabetical or numerical order.
4. Prepare cross-reference sheets/indexes according to facility policy/procedures.
5. File items behind guides/dividers according to facility policy/procedures.
6. File cross-reference sheets/indexes as required.

17.58 TASK: Orient and train employees/students

PERFORMANCE OBJECTIVE: Given new employees/students, tools and equipment, orient and train employees/students. The orientation/training needs of the new employee(s)student(s) must be identified, materials prepared and orientation/training sessions conducted in accordance with facility policies/procedures.

ENABLING OBJECTIVES:

1. Review facility policy/procedures/requirements for orientation and training.

2. Identify/analyze individual needs for orientation.
3. Identify/establish units/topics needed for orientation session(s), (include facility goals, objectives, policies, procedures, work requirements, safety, personnel, benefits.)
4. Analyze/compare personnel job descriptions and performance records.
5. Analyze facility/technology innovations since new staff employed and previous training sessions.
6. Survey employees/students to ascertain perceived training needs.
7. Develop instructional/learning units.
8. Determine methods of delivery.
9. Identify/obtain/schedule instructors/resource persons.
10. Identify/schedule orientation/training sessions.
11. Inform employees/students of orientation/training schedule(s).
12. Conduct orientation/training session(s) as scheduled.
13. Evaluate and prepare report of results of orientation session(s).
14. Evaluate achievements/performance of employees/students (include oral, written, performance tests).
15. Record/report individual achievement results.
16. Counsel with employees/students regarding training results.
17. Re-teach as necessary.

17.59 TASK: Develop/coordinate personnel continuing education opportunities

PERFORMANCE OBJECTIVE: Given a list of personnel needing inservice/continuing education, facility requirements for continuing education, tools and equipment, develop/coordinate personnel continuing education opportunities. The report of continuing education participation must include participation of specified personnel in continuing education opportunities in accordance with assessed needs and facility policies/procedures.

ENABLING OBJECTIVES:

1. Review facility policies/procedures for inservice/continuing education requirements.
2. Determine/assess employee continuing education needs/requirements both professional/non-professional.
3. Identify inservice/continuing education programs available.
4. Develop inservice/continuing education session(s) needed.

5. Gather/post notices regularly of continuing education programs held both inside/outside of facility.
6. Counsel/schedule employee(s) to attend session.
7. Obtain evaluations of session. Verify if needs were met.
8. Prepare report of continuing education participation and recommendations for further inservice/continuing education.
9. Submit/forward/file report in accordance with facility policy/procedures.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 18 - PERFORM INFORMATION PROCESSING SPECIALTY ACTIVITIES

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Each task describes an occupational activity which will result in a finished process or product. Such a process or product should always allow an evaluation using standards which address the operation, appearance, dimensions, time in which achieved, or similar characteristics. The tasks listed in each module represent the basic activities required of each student to demonstrate entry level competence for that specific system or field of study within business occupations.

The capability for providing instructional experiences and practical application of the tasks contained in each module will determine the scope of the business systems specialists. In this regard, the student's maturity and preparation to receive instructions well as the availability of equipment and the expertise of the instructional staff will be of primary importance. Individual records of student performance in completing the tasks listed within each module should be maintained.

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It is the goal of this program standard to provide a level of instruction which will impart entry level employment skills. Students should be carefully counseled on the importance of attaining competency in the tasks assigned. As in virtually all occupations today, business systems specialists will require periodic up-dating and review in the future. It is important that each student understand that meeting the program standards is essential not only to obtain employment today but also to have a base upon which to retain employment in the future.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 18 - PERFORM INFORMATION PROCESSING SPECIALTY ACTIVITIES

18.0 PERFORM INFORMATION PROCESSING SPECIALTY ACTIVITIES--The student will be able to:

- 18.01 Edit documents on automated equipment
- 18.02 Input, store, and output business documents, including scanners
- 18.03 Revise and output stored documents and output using automated equipment
- 18.04 Demonstrate knowledge of word processing concepts and terms
- 18.05 Create business documents using spreadsheet, database, and graphics application software
- 18.06 Demonstrate knowledge of the advantages and disadvantages of integrated bs. dedicated software
- 18.07 Create and maintain a database
- 18.08 Compose, send, and retrieve electronic messages

MODULE 18 - PERFORM INFORMATION PROCESSING SPECIALTY ACTIVITIES

18.01 TASK: Edit documents on automated equipment

PERFORMANCE OBJECTIVE: Given a file stored on disk, a microcomputer with the necessary software with which the student is familiar, s/he will edit the data by proofreading, correcting errors, and storing the data so that it may be retrieved and printed to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate microcomputer operation abilities including power up, loading software, power down, disk handling procedures, and peripheral operation.
2. Demonstrate ability to retrieve documents from storage media and save revised documents without destroying data on the original disk.
3. Demonstrate familiarity with the special function keys or command keys on the system.
4. Demonstrate with complete accuracy the use of the delete and insert functions specific to the software.
5. Use proper keystrokes to display and use any menu available on the system.
6. Demonstrate the ability to produce mailable copy in acceptable time.

18.02 TASK: Input, store, and output business documents, including scanners

PERFORMANCE OBJECTIVE: Given an assignment to key in, a microcomputer, the necessary software, and a printer on which the student is trained, s/he will perform the functions necessary to store, retrieve, and print a business document which might include input from a scanner. Tasks will be performed to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate microcomputer operation abilities including power up, loading software, power down, disk handling procedures, and peripheral operation.
2. Demonstrate ability to save documents to a floppy disk.
3. Demonstrate familiarity with the function keys or command keys by using those keys.
4. Demonstrate the ability to operate the printer, load paper, and print data.
5. Demonstrate correct operating procedures for a scanner.
6. Demonstrate a knowledge of proofreading marks.
7. Demonstrate the ability to input, modify, and print data with complete accuracy.
8. Demonstrate correct formatting procedures for business documents.

18.03 TASK: Revise and output stored documents using automated equipment

PERFORMANCE OBJECTIVE: Given a document on disk, a microcomputer, necessary software, and a printer with which the student is familiar, s/he will perform the functions to edit the data, print, and store the revised document to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate microcomputer operation abilities including power up, loading software, power down, disk handling procedures, and peripheral operation.
2. Demonstrate ability to retrieve documents from storage media and save revised documents without destroying data on the original disk.
3. Demonstrate familiarity with the function keys or command keys by using those keys.
4. Demonstrate the knowledge of proofreading marks.
5. Demonstrate the process to edit data using correct features of the software with accuracy and timeliness.
6. Demonstrate the ability to operate the printer, load paper, and print data.

18.04 TASK: Demonstrate knowledge of word processing concepts and terms

PERFORMANCE OBJECTIVE: Given a list of concepts and terms common to word processing, the student will identify and describe all terms both in writing and orally to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Describe how to use the function keys or command keys on the system.
2. Identify what function each key performs.
3. Identify the types of word processing hardware and software available.
4. List, using correct composition and format, the steps to create, revise, spell check, and print a document.
5. Demonstrate familiarity with the special function keys by operating those keys or orally describing their purpose and use.

18.05 TASK: Create business documents using spreadsheet, database, and graphics application software

PERFORMANCE OBJECTIVE: Given appropriate reference manuals, a microcomputer and electronic spreadsheet, database, and graphics program disks with which the student is familiar, and appropriate reference manuals, s/he will load the programs and perform assigned tasks to the satisfaction of the instructor.

ENABLING OBJECTIVES:

Spreadsheet:

1. Demonstrate a knowledge of the terms and concepts of an electronic spreadsheet.
2. Demonstrate the ability to enter data and formulas at desired locations on the spreadsheet using correct operating procedures.
3. Demonstrate the ability to design a spreadsheet template using formatting and data entry commands to produce the desired report format.
4. Demonstrate the ability to move and edit the information in the spreadsheet program without destroying or modifying the material that is to be retained for further use.
5. Demonstrate the ability to use the spreadsheet program to answer "What if?" questions such as "What if advertising were increased 10 percent?" and "What if cost of goods sold increased 5 percent?"
6. Demonstrate the ability to retrieve, update, save, and print a worksheet.

Database:

1. Demonstrate a knowledge of the terms and concepts of an electronic database.
2. Demonstrate the ability to style and format a database.
3. Demonstrate the ability to move and edit information in the database program without destroying or modifying the material that is to be retained for further use.
4. Demonstrate the ability to search and sort data in a database.
5. Demonstrate the ability to filter data for specific reports.
6. Demonstrate the ability to print labels using a database.
7. Demonstrate the ability to retrieve, update, save, and print a database in report form.

Graphics:

1. Demonstrate a knowledge of the terms and concepts of a graphics program.
2. Demonstrate the ability to utilize spreadsheet reports to create graphs.
3. Demonstrate the ability to create pie, line, bar, and stacked bar graphs.
4. Demonstrate the ability to explode a pie slice.
5. Demonstrate the ability to label and customize graphs.
6. Demonstrate the ability to overlay a graph.
7. Demonstrate the ability to drag and size a graph.
8. Demonstrate the ability to retrieve, update, save, display, and print a graph.

18.06 TASK: Demonstrate knowledge of the advantages and disadvantages of integrated vs. dedicated software

PERFORMANCE OBJECTIVE: Being familiar with both integrated and dedicated software, the student will demonstrate and explain to the instructor's satisfaction the advantages and disadvantages of each one.

ENABLING OBJECTIVES:

1. Demonstrate the ability to create word processing documents, databases, spreadsheets, and graphics using integrated software.
2. Demonstrate the ability to create word processing documents, databases, spreadsheets, and graphics using dedicated software.
3. Demonstrate the ability to integrate the above files using integrated software.
4. Demonstrate the ability to integrate the above files using dedicated software.
5. Compare the two and list the advantages and disadvantages of each.

6. Compile a report comparing the overall advantages and disadvantages of integrated vs. dedicated software.

18.07 TASK: Create and maintain a database

PERFORMANCE OBJECTIVE: Given a computer with which the student is familiar, related manuals, and a familiar database program, the student will demonstrate a knowledge of the database program, how to create a database containing 20 entries, and be able to perform 15 tasks following the instructions and data provided to the instructor's satisfaction.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of the terms and commands of a database program.
2. Demonstrate a knowledge of the correcting features in the database program.
3. Demonstrate the ability to set up a database program with fields correctly styled and formatted.
4. Demonstrate the ability to navigate in a database.
5. Demonstrate the ability to key data accurately into a database program.
6. Demonstrate the ability to use the program for sorting records.
7. Demonstrate the ability to change data in the program without losing or disrupting the database.
8. Demonstrate the ability to expand or contract the database.
9. Demonstrate the ability to print labels using the database prepared.
10. Demonstrate the ability to find information in a database.
11. Demonstrate the ability to lock or protect fields.
12. Demonstrate the ability to size a field.
13. Demonstrate the ability to move and copy data in a database.
14. Demonstrate the ability to filter out data for a report.
15. Demonstrate the ability to produce a print-out of the data either in full or in part.
16. Demonstrate the ability to save and retrieve a file.

18.08 TASK: Compose, send, and retrieve electronic messages

PERFORMANCE OBJECTIVE: Given a microcomputer with which the student is familiar, an electronic communications program, appropriate reference material, and access to a remote computer system, the student will demonstrate the ability to compose, send, and retrieve electronic messages using correct format, composition and operating procedures to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate microcomputer operation abilities including power up, loading software, power down, disk handling procedures, and peripheral operation.
2. Demonstrate, using the features of the software, how to compose and send electronic messages with complete accuracy and timeliness.
3. Demonstrate ability to receive and store electronic messages without destroying data.
4. Demonstrate familiarity with special function keys or command keys on the system.
5. Use proper keystrokes to display and use any menu available on the system.
6. Demonstrate knowledge of file maintenance procedures as it relates to electronic mail.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 19 - PERFORM WORD PROCESSING SPECIALTY ACTIVITIES

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

Each task describes an occupational activity which will result in a finished process or product. Such a process or product should always allow an evaluation using standards which address the operation, appearance, dimensions, time in which achieved, or similar characteristics. The tasks listed in each module represent the basic activities required of each student to demonstrate entry level competence for that specific system or field of study within business occupations.

The capability for providing instructional experiences and practical application of the tasks contained in each module will determine the scope of the business systems specialists. In this regard, the student's maturity and preparation to receive instructions well as the availability of equipment and the expertise of the instructional staff will be of primary importance. Individual records of student performance in completing the tasks listed within each module should be maintained.

Although some provision is made for basic mathematics and communication skills within these standards, they may not be adequate to meet the needs of individual students. Counseling, guidance, and diagnostic test results may indicate a need for further preparation in these areas. In such cases, instructors are encouraged to utilize the resources and personnel within the institution to improve or complement the instructional process.

It is the goal of this program standard to provide a level of instruction which will impart entry level employment skills. Students should be carefully counseled on the importance of attaining competency in the tasks assigned. As in virtually all occupations today, business systems specialists will require periodic up-dating and review in the future. It is important that each student understand that meeting the program standards is essential not only to obtain employment today but also to have a base upon which to retain employment in the future.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 19 - PERFORM WORD PROCESSING SPECIALTY ACTIVITIES

19.0 PERFORM WORD PROCESSING SPECIALTY ACTIVITIES--The student will be able to:

- 19.01 Edit documents on automated equipment
- 19.02 Input, store, and output business documents including scanners
- 19.03 Revise and output stored documents using automated equipment
- 19.04 Demonstrate knowledge of word processing concepts and terms
- 19.05 Create business documents using word processing procedures
- 19.06 Demonstrate knowledge of various word processing software
- 19.07 Compose, send, and retrieve electronic messages

MODULE 19 - PERFORM WORD PROCESSING SPECIALTY ACTIVITIES

19.01 TASK: Edit documents on automated equipment

PERFORMANCE OBJECTIVE: Given documents that require editing, the necessary equipment and supplies, and all appropriate reference materials, the student will edit the documents in mailable form within acceptable time.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of proofreading marks.
2. Demonstrate the knowledge of following special instructions and making revisions that are necessary.
3. Demonstrate the ability to utilize automated equipment and word processing software.
4. Demonstrate the ability to define and produce mailable copy in acceptable time.

19.02 TASK: Input, store, and output business documents including scanners

PERFORMANCE OBJECTIVE: Given business documents, the necessary equipment (including scanner), supplies, and all appropriate reference materials, the student will input, store, and output business documents in mailable form within acceptable time.

19.03 **Task: Revise and output stored documents using automated equipment**

PERFORMANCE OBJECTIVE: Given stored documents requiring revisions, the necessary equipment and supplies, and any appropriate reference materials, the student will revise and output these stored documents on automated equipment in mailable form within acceptable time.

ENABLING OBJECTIVES:

1. **Demonstrate a knowledge of proofreading marks.**
2. **Demonstrate the knowledge of following special instructions and making revisions that are necessary.**
3. **Demonstrate a knowledge of formatting documents.**
4. **Demonstrate the ability to utilize automated equipment and word processing software.**
5. **Demonstrate a knowledge of outputting documents using a monitor or printer.**
6. **Demonstrate the ability to define and produce mailable documents in acceptable time.**

19.04 **TASK: Demonstrate knowledge of word processing concepts and terms**

PERFORMANCE OBJECTIVE: Given a list of concepts and terms common to word processing, the student will identify and describe all terms, both in writing and orally to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. **Describe how to use the function keys or command keys on the system.**
2. **Identify what function each key performs.**
3. **Identify the types of word processing hardware and software available.**
4. **List, using correct composition and format, the steps to create, revise, spell check, and print a document.**
5. **Demonstrate familiarity with the special function keys by operating those keys or orally describing their purpose and use.**

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of inputting documents using a scanner, a keyboard, or disks.
2. Demonstrate the ability to follow special instructions and make necessary revisions.
3. Demonstrate a knowledge of formatting documents.
4. Demonstrate a knowledge of storing documents.
5. Demonstrate a knowledge of outputting documents using a monitor or printerng those keys or orally describing their purpose and use.

19.05 TASK: Create business documents using word processing procedures

PERFORMANCE OBJECTIVE: Given a microcomputer, necessary software, and tasks including letters, memoranda, and manuscripts/reports, the student will create revise, spell check, and produce the documents with all documents complete and in mailable form within acceptable time.

ENABLING OBJECTIVES:

1. Demonstrate microcomputer operation abilities including power up, loading software, power down, disk handling procedures, and peripheral operation.
2. Demonstrate ability to save documents to disk.
3. Demonstrate familiarity with the function or command keys by using them.
4. Demonstrate the ability to operate the printer, load paper, and print data.
5. Demonstrate the ability to input, modify, and print data with complete accuracy.
6. Demonstrate correct formatting procedures for business documents.

19.06 TASK: Demonstrate knowledge of various word processing software

PERFORMANCE OBJECTIVE: Given a list of business applications which may include the following: document management and control, recordkeeping, data processing, mailing labels, spreadsheets, etc., the student will review and evaluate available software then select the appropriate package, providing all pertinent information to the instructor's satisfaction.

ENABLING OBJECTIVES:

1. Identify the types of word processing software available.
2. Demonstrate the ability to select the most suitable software for the task.

19.07 **TASK:** Compose, send, and retrieve electronic messages

PERFORMANCE OBJECTIVE: Given a microcomputer with which the student is familiar, an electronic communications program, appropriate reference material, and access to a remote computer system, the student will demonstrate the ability to compose, send, and retrieve electronic messages using correct format, composition, and operating procedures, to the satisfaction of the instructor.

ENABLING OBJECTIVES:

1. Demonstrate microcomputer operation abilities including power up, loading software, power down, disk handling procedures, and peripheral operation.
2. Demonstrate, using the features of the software, how to compose and send electronic messages with complete accuracy and timeliness.
3. Demonstrate ability to receive and store electronic messages without destroying data.
4. Demonstrate familiarity with special function keys or command keys on the system.
5. Use proper keystrokes to display and use any menu available on the system.
6. Demonstrate knowledge of file maintenance procedures as it relates to electronic mail.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 20 - PERFORM INSURANCE SPECIALTY ACTIVITIES

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Although some provision is made for basic mathematics and communication skills within these standards, they may not be adequate to meet the needs of individual students. Counseling, guidance, and diagnostic test results may indicate a need for further preparation in these areas. In such cases, instructors are encouraged to utilize the resources and personnel within the institution to improve or complement the instructional process.

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 20 - PERFORM INSURANCE SPECIALTY ACTIVITIES

20.0 PERFORM INSURANCE SPECIALTY ACTIVITIES--The student will be able to:

- 20.01 Select and complete insurance forms
- 20.02 Demonstrate knowledge of insurance terms
- 20.03 Locate and record information found in insurance manuals
- 20.04 Prepare and maintain insurance records
- 20.05 Process insurance claims
- 20.06 Prepare insurance billing documents
- 20.07 Complete insurance documents on automated equipment

MODULE 20 - PERFORM INSURANCE SPECIALTY ACTIVITIES

20.01 TASK: Select and complete insurance forms

PERFORMANCE OBJECTIVE: Given various insurance forms, insurance data, and instructions the student will select and complete the forms with 100 percent accuracy.

ENABLING OBJECTIVES:

1. Identify different insurance forms and the appropriate use of each.
2. Fill-in the appropriate information on an insurance form.

20.02 TASK: Demonstrate knowledge of insurance terms

PERFORMANCE OBJECTIVE: Given a list of insurance terms and definitions the student will develop an understanding of the terms used to describe insurance policies and coverages as measured by 90 percent accuracy on a matching test.

ENABLING OBJECTIVES:

1. Learn definitions of terms related to the insurance industry.
2. Distinguish between different types of insurance coverages.
3. Demonstrate a knowledge of insurance terms.

20.03 TASK: Locate and record information found in insurance manuals

PERFORMANCE OBJECTIVE: Given the appropriate insurance manuals and information to be researched, the student will locate and record the information with 100 percent accuracy.

ENABLING OBJECTIVES:

1. Effectively use insurance manuals.
2. Demonstrate the ability to accurately record information found in insurance manuals.

20.04 TASK: Prepare and maintain insurance records

PERFORMANCE OBJECTIVE: Given insurance information about clients and the appropriate materials, the student will prepare, update, and maintain insurance records in a simulated environment. All records must be accurate as measured by a checklist.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of insurance records and the preparation of insurance records.
2. Demonstrate a knowledge of insurance records and the maintenance of insurance records.

20.05 TASK: Process insurance claims

PERFORMANCE OBJECTIVE: Given insurance forms and client claim information, the student will process insurance claims in a simulated environment. All claims must be accurate as measured by a checklist.

ENABLING OBJECTIVES:

1. Evaluate insurance claims for accuracy of information.
2. Fill out the appropriate claim forms.
3. Demonstrate a knowledge of the entire insurance claim process.

20.06 TASK: Prepare insurance billing documents

PERFORMANCE OBJECTIVE: Given insurance billing forms and billing data the student will complete a simulated insurance billing with 100 percent accuracy.

ENABLING OBJECTIVES:

1. Utilize the appropriate forms for billing purposes.
2. Demonstrate a knowledge of the entire billing process.

20.07 **TASK:** **Complete insurance documents on automated equipment**

PERFORMANCE OBJECTIVE: Given insurance forms, insurance data, and automated equipment, the student will complete the necessary documents with 100 percent accuracy.

ENABLING OBJECTIVES:

1. Demonstrate the ability to use automated office equipment.
2. Analyze insurance information to determine appropriate processing.
3. Demonstrate the ability to accurately complete insurance documents on automated equipment.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 21 - PERFORM DESKTOP PUBLISHING SPECIALTY ACTIVITIES

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 21 - PERFORM DESKTOP PUBLISHING SPECIALTY ACTIVITIES

21.0 PERFORM DESKTOP PUBLISHING ACTIVITIES--The student will be able to:

- 21.01 Define desktop publishing
- 21.02 Use the windows environment
- 21.03 Use the mouse in the windows environment
- 21.04 Demonstrate knowledge of desktop publishing terms
- 21.05 Demonstrate knowledge of communications software/hardware
- 21.06 Create documents using intergrated software
- 21.07 Demonstrate knowledge of the basics of the design process in publishing
- 21.08 Analyze previous and current industry techniques in document design
- 21.09 Determine effective strategies for publication design
- 21.10 Demonstrate knowledge of the principles of graphic design and layout
- 21.11 Identify equipment and materials used in graphic design and layout
- 21.12 Create visuals using desktop graphics software
- 21.13 Utilize creative techniques to design simple publications
- 21.14 Demonstrate knowledge of desktop publishing templates
- 21.15 Create and apply custom colors
- 21.16 Setup and apply type styles, paragraph formats, and tabs/indents
- 21.17 Demonstrate knowledge of scanning and scanning terminology
- 21.18 Integrate scanned images
- 21.19 Use desktop publishing image control to manipulate graphic images
- 21.20 Create multiple-page documents
- 21.21 Integrate word processing documents into desktop publishing
- 21.22 Bring together all word processing, TIF, PNT, EPS, and CDR files into a finished publication from creation to publication

MODULE 21 - PERFORM DESKTOP PUBLISHING ACTIVITIES

21.01 TASK: Define desktop publishing

PERFORMANCE OBJECTIVE: Given essay questions, the student will be able to define desktop publishing, identify and define the desktop publishing components,

and demonstrate knowledge of desktop publishing history with 90 percent accuracy.

ENABLING OBJECTIVES:

1. Define desktop publishing.
2. Understand the history of desktop publishing.
3. Identify desktop publishing components.

21.02 TASK: Use the Windows environment

PERFORMANCE OBJECTIVE: Given a multiply choice and performance test, the student will be able to demonstrate knowledge of the Windows operating environment with 90 percent accuracy and correctly use the Windows environment.

ENABLING OBJECTIVES:

1. Understand the Windows operating environment.
2. Utilize the Windows operating environment.

21.03 TASK: Use the mouse in the windows environment

PERFORMANCE OBJECTIVE: In the Windows environment, the student will be able to efficiently and effectively use the mouse for selection, movement, and placement of text and graphics.

ENABLING OBJECTIVES:

1. Efficiently and effectively use the mouse for selection, movement, and placement of text and graphics.

21.04 TASK: Demonstrate knowledge of desktop publishing terms

PERFORMANCE OBJECTIVE: Given fifty terms, the student will be able to match them to the definitions.

ENABLING OBJECTIVES:

1. Learn terminology of desktop publishing.
2. Match terms to definitions.
3. Become familiar with measuring systems for type and layout.
4. Explore typography from an historical viewpoint and how it has evolved to desktop publishing.

21.05 TASK: Demonstrate knowledge of communications software/hardware

PERFORMANCE OBJECTIVE: Know the type of hardware configurations needed as well as the types of software available to do desktop publishing tasks.

ENABLING OBJECTIVES:

1. Use Windows and mouse techniques to select menus, select commands, and fill in dialog boxes.
2. Present a generic approach to the concept of image processing, presentation of graphics, and desktop publishing.

21.06 TASK: Create documents using integrated software

PERFORMANCE OBJECTIVE: Be able to use the tools of the computer, software, and laser printer to produce professional-looking documents, such as newsletters, annual reports, catalogs, and brochures, and be able to import word processing documents into desktop publishing software programs.

ENABLING OBJECTIVES:

1. Start the desktop publisher and start a new publication.
2. Move the page around on the screen using appropriate methods.
3. Use desktop publishing drawing tools to draw lines, boxes, and other shapes.
4. Type, select, and edit text.
5. Change the width and size of a text block
6. Create multiple text blocks, then recombine them into a single text block.
7. Change the view of the page using commands.
8. Use the mouse/keyboard shortcuts for changing views and zooming in on a particular part of the page.
9. Save and close a desktop publishing publication.
10. Open an existing publication.
11. Set up target printer.
12. Change settings for the target printer.
13. Change the page setup.
14. Use master pages to create repeating elements.
15. Insert pages in a publication.
16. Draw opaque box to block items in lower layers.
17. Flow text in a text block.
18. Change alignment.
19. Change type specs and size.
20. Copy and paste.
21. Store items on the pasteboard.
22. Work with facing pages.
23. Use different numbers of columns on facing pages.
24. Change the length and width of text blocks.

25. Reflow text.
26. Kern text to tighten space between characters.
27. Print a publication.
28. Create a double-sized publication with multiple pages and facing pages.
29. Create page number markers on the master page.
30. Copy and paste master items from one master page to another.
31. Select all items in the publication window and deselect individual items.
32. Define spot colors, as well as display and hide the color palette.
33. Create a style sheet, as well as display the style palette.
34. Work with word processed text that is pretagged for style sheets and that is not pretagged.
35. Apply spot color to graphics.
36. Block master page items by covering them with other items.
37. Modify the style sheet.
38. Edit text by adding, deleting, and replacing text.
39. Align adjacent text blocks.
40. Adjust the length of text blocks.
41. Determine appropriate places for ending columns of text.
42. Override a style.
43. Specify the line length for typed text you type.
44. Apply styles to unformatted text and new text.
45. Create tab stops.
46. Preview publication.
47. Manually create registration marks.

21.07 TASK: Demonstrate knowledge of the basics of the design process in publishing

PERFORMANCE OBJECTIVE: Given a written test, the student will correctly answer 90 percent of the questions relating to the basics of the design process in publishing.

ENABLING OBJECTIVES:

1. Logically discuss the impact of desktop publishing on the printing and publishing industry.
2. Determine an effective sequence for the design of an electronic document.

21.08 TASK: Analyze previous and current industry techniques in document design

PERFORMANCE OBJECTIVE: Given a test, the student will correctly answer 90 percent of the questions relating to graphic and character elements in publication composition.

ENABLING OBJECTIVE:

1. Analyze the use of graphic and character elements in the composition of a publication.

21.09 TASK: Determine effective strategies for publication design

PERFORMANCE OBJECTIVE: Given a written test on design terminology, the student will correctly answer 90 percent of the questions. Given specific situations, the student will correctly select publication layouts.

ENABLING OBJECTIVES:

1. Select appropriate layouts for specific types of publications.
2. Define terms associated with type, type specifications, and the printing industry.

21.10 TASK: Demonstrate knowledge of the principles of graphic design and layout

PERFORMANCE OBJECTIVE: To develop an appreciation of basic artistic and design layout aspects of desktop publishing.

ENABLING OBJECTIVES:

1. Add text and various kinds of graphics created and saved on disk with other applications.
2. Resize graphics.
3. Drag and reposition text blocks and graphics.
4. Change line and shade styles.
5. Create a graphic boundary for wrapping text around a graphic.
6. Create a ruler guide useful for positioning text and graphics.
7. Add graphic motifs to the master pages.
8. Understand the basic elements of typography and design in desktop publishing and how they relate to each other and the page.
9. Start a swipe file or pleasing examples of design work for reference purposes, as well as examples of design mistakes.

21.11 TASK: Identify equipment and materials used in graphic design and layout

PERFORMANCE OBJECTIVE: Given resource materials identifying the equipment and materials used in graphic design and layout, the student will demonstrate a working knowledge of equipment and materials while completing on-the-job applications.

ENABLING OBJECTIVES:

1. Students will have access to necessary hardware/software.
2. Students will utilize all necessary materials used in graphic design and layout.

21.12 TASK: Create visuals using desktop graphics software

PERFORMANCE OBJECTIVE: To learn to create newsletters, annual reports, class posters, banners, report covers, and administrative flyers that include graphics.

ENABLING OBJECTIVES:

1. Select graphics, resize or scale them, move them, and change their stacking order and shading.
2. Create drop shadows.
3. Crop a graphic, then pan the graphic within the resulting frame.
4. Create special image effects on paint-type graphics and scanned images.
5. Create a graphic boundary on a rectangular graphic.
6. Change the stacking order of two items at the same time.
7. Flow text semi-automatically and automatically.
8. Print spot color overlays.
9. Perform thumbnail sketches and free hand layouts for a desktop project and analyze their weaknesses and strengths prior to production.

21.13 TASK: Utilize creative techniques to design simple publications

PERFORMANCE OBJECTIVE: Given a specific need, the student will successfully design, produce, and sell a publication to customer satisfaction.

ENABLING OBJECTIVE:

1. Successfully design, produce, and "sell" a publication layout.

21.14 TASK: Demonstrate knowledge of desktop publishing templates

PERFORMANCE OBJECTIVE: The student will define a template and correctly create, save, and use said template.

ENABLING OBJECTIVES:

1. Define desktop publishing templates.
2. Create desktop publishing templates.

3. Save desktop publishing templates.
4. Use desktop publishing templates.

21.15 TASK: Create and apply custom colors

PERFORMANCE OBJECTIVE: In a publication, the student will create, apply, and save customized colors to the satisfaction of the customer.

ENABLING OBJECTIVES:

1. Create custom colors.
2. Apply custom colors.
3. Save custom colors.

21.16 TASK: Setup and apply type styles, paragraph formats, and tabs/indents

PERFORMANCE OBJECTIVE: Using design principles, the student will create type styles and faces, create and use tabs/indents, and create overall styles to the customer's satisfaction.

ENABLING OBJECTIVE:

1. Set up specific styles in desktop publishing to create selected type styles and type faces, paragraph formats, and tabs and indents.

21.17 TASK: Demonstrate knowledge of scanning and scanning terminology

PERFORMANCE OBJECTIVE: Given 20 multiple choice questions on scanning terminology, the student will answer the questions with 90 percent accuracy.

ENABLING OBJECTIVE:

1. Understand scanning in terms of resolution, line art, halftoning, graphic formats, and image control.

21.18 TASK: Integrate scanned images

PERFORMANCE OBJECTIVE: The student will integrate previously scanned images into a publication and will scan images using scanning resolution, halftoning, and image control for clarity to the satisfaction of the customer.

ENABLING OBJECTIVES:

1. Successfully integrate scanned images into desktop publishing documents.

2. Demonstrate knowledge of scanning in terms of resolution, line art, halftoning, graphic formats, and image control by scanning.

21.19 TASK: Use desktop publishing image control to manipulate graphic images

PERFORMANCE OBJECTIVE: Using the desktop publishing image control feature, the student will perfect the previously scanned image in desktop publishing to the satisfaction of the customer.

ENABLING OBJECTIVE:

1. Use desktop publishing image control to manipulate graphic images.

21.20 TASK: Create multiple-page documents

PERFORMANCE OBJECTIVE: Effectively using master pages or templates, the student will design, create, save, and print a multiple-page document to the satisfaction of the customer.

ENABLING OBJECTIVES:

1. Design a template for a multiple-page document.
2. Create a multiple-page document effectively using master pages.
3. Save a multiple-page document.
4. Print a multiple-page document.

21.21 TASK: Integrate word processing documents into desktop publishing.

PERFORMANCE OBJECTIVE: The student will integrate word processing documents which have been formatted for desktop publishing and unformatted word processing documents into existing desktop publishing publications to the satisfaction of the customer.

ENABLING OBJECTIVE:

1. Integrate word processing documents into desktop publishing. These documents may have been created with tagged file formats or may be unformatted documents.

21.22 TASK: Bring together all word processing, TIF, PNT, EPS, and CDR files into a finished publication from creation to publication.

PERFORMANCE OBJECTIVE: At the request of the customer, the student will successfully create, from design through print, a customer-approved finished publication using

word processing files, tagged image format files, paint files, encapsulated postscript files, and drawing files.

ENABLING OBJECTIVES:

1. Design a composition to the customer's specifications.
2. Locate or create graphics in tagged image format, paint format, encapsulated postscript format, and draw format for insertion into the publication.
3. Locate word processed text or create desktop publishing text for insertion into the publication.
4. Save and print the final publication.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 22 - PERFORM ACCOUNTING SPECIALTY ACTIVITIES

This is one of a series of modules which comprise the Idaho Program Standards for Business Systems Specialist. Each module contains a listing of the tasks, performance objectives, and enabling objectives required to enable a student to achieve competency in a specific system or field of study within the business systems specialist field. The numbering of these modules is not intended to dictate an order of instruction or scheduling. The order in which these modules may be taught is determined by each institution and its instructors.

Each task describes an occupational activity which will result in a finished process or product. Such a process or product should always allow an evaluation using standards which address the operation, appearance, dimensions, time in which achieved, or similar characteristics. The tasks listed in each module represent the basic activities required of each student to demonstrate entry level competence for that specific system or field of study within business occupations.

The capability for providing instructional experiences and practical application of the tasks contained in each module will determine the scope of the business systems specialists. In this regard, the student's maturity and preparation to receive instructions well as the availability of equipment and the expertise of the instructional staff will be of primary importance. Individual records of student performance in completing the tasks listed within each module should be maintained.

Although some provision is made for basic mathematics and communication skills within these standards, they may not be adequate to meet the needs of individual students. Counseling, guidance, and diagnostic test results may indicate a need for further preparation in these areas. In such cases, instructors are encouraged to utilize the resources and personnel within the institution to improve or complement the instructional process.

It is the goal of this program standard to provide a level of instruction which will impart entry level employment skills. Students should be carefully counseled on the importance of attaining competency in the tasks assigned. As in virtually all occupations today, business systems specialists will require periodic up-dating and review in the future. It is important that each student understand that meeting the program standards is essential not only to obtain employment today but also to have a base upon which to retain employment in the future.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 22 - PERFORM ACCOUNTING SPECIALTY ACTIVITIES

22.0 PERFORM ACCOUNTING SPECIALTY ACTIVITIES--The student will be able to:

22.01 Prepare payroll records
22.02 Record transactions in special journals
22.03 Post journal entries to subsidiary ledgers
22.04 Record transactions in general journal
22.05 Post entries from a general journal to a general ledger
22.06 Prepare work sheet
22.07 Prepare income statement
22.08 Prepare statement of owner's equity
22.09 Prepare balance sheet
22.10 Journalize and post adjusting entries
22.11 Journalize and post closing entries
22.12 Prepare post closing trial balance
22.13 Prepare data for a general budget
22.14 Interpret financial statements
22.15 Perform accounting functions using an automated system
22.16 Perform accounting functions using an automated spreadsheet system

MODULE 22 - PERFORM ACCOUNTING SPECIALTY ACTIVITIES

22.01 TASK: Prepare payroll records

PERFORMANCE OBJECTIVE: Given completed W-4 form(s), time card(s) with times entered, other earnings information (salary and commission), the necessary blank payroll register, employees earnings records, and the necessary tax tables and supplies, fill out the earnings record(s), the student will complete a payroll register for one pay period performing all necessary calculations, and post each line of the payroll register to the corresponding employee's earnings record to balance with instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of all terms related to preparing payroll records and the payroll process.
2. Enter all necessary employees' information from the W-4 forms onto the blank employee's earnings records.
3. Compute regular time and overtime gross earnings.
4. Compute gross earnings on straight commission, commission plus salary, and graduated commission basis.
5. Calculate employee's income tax using tax tables.

6. Compute FICA tax.
7. Complete the payroll register for a pay period using gross pay, and deduction information to calculate net pay and total, balance, and verify the accuracy of the register.
8. Correctly post each line of the payroll register to the corresponding employee's earnings records.

22.02 TASK: Record transactions in special journals

PERFORMANCE OBJECTIVE: Given a list of business transactions, a general journal, a sales journal, a purchases journal, a cash receipts journal, and a cash payments journal, the student will analyze and record all transactions in the appropriate journal to balance with instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms, concepts, and processes related to analyzing and recording business transactions in special journals.
2. Analyze business transactions into debit and credit parts.
3. Determine which journal is appropriate for the recording of each type of transaction.
4. Record each transaction in the appropriate journal making the descriptive and numerical entries in the proper columns.
5. Foot and prove the equality of debits and credits in the journals.
6. Prove cash by comparing check record or actual cash balances with the journals' cash columns' totals.
7. Total and rule the journals.

22.03 TASK: Post journal entries to subsidiary ledgers

PERFORMANCE OBJECTIVE: Given completed journals, the subsidiary ledgers, and the general ledger accounts for the appropriate general ledger controlling accounts, the student will post the entries affecting subsidiary ledger accounts to the proper accounts, post the necessary journal column totals to the general ledger controlling account for each subsidiary ledger, prepare subsidiary ledger schedules, and verify schedule totals with controlling account balances. After posting all posting reference marks must be properly entered and all subsidiary ledger accounts must have the correct balance when compared with the instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms and concepts related to the process of posting to and verifying the accuracy subsidiary ledgers.
2. Post the individual amounts in the appropriate columns to the appropriate subsidiary ledger accounts.
3. Post the totals of the appropriate special columns to the general ledger controlling accounts for each subsidiary ledger.
4. Calculate an updated balance for each account after each posting.
5. Indicate proper posting references.
6. Prepare a schedule for each subsidiary ledger.
7. Verify accuracy of posting to subsidiary ledgers by comparing the schedule totals with the controlling account balances.

22.04 TASK: Record transactions in general journal

PERFORMANCE OBJECTIVE: Given a general journal, a list of transactions, and a chart of accounts for the accompanying general ledger, the student will record the transactions in the general journal. All descriptive, numerical, and reference entries must be correct when compared with the instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms, concepts, and processes related to analyzing and recording business transactions in a general journal.
2. Analyze each transaction into debit and credit parts.
3. Verify source documents.
4. Properly record date entries in the date column.
5. Record debit account(s) title and amount.
6. Record credit account(s) title and amount.
7. Record explanation and source document information.
8. Check equality of debits and credits for each transaction.

22.05 TASK: Post entries from a general journal to a general ledger

PERFORMANCE OBJECTIVE: Given a completed general journal page and a corresponding general ledger, the student will post the entries from the journal to the ledger. All items must be posted correctly when compared with the instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms, concepts, and processes related to the posting of entries from a general journal to a general ledger.
2. Identify and locate appropriate ledger accounts for each entry.
3. Properly record date entries in the date column.
4. Enter explanation or description, if needed.
5. Enter the amount in the appropriate entry column.
6. Calculate and record the updated account balance in the balance column.
7. Fill in the posting reference column in the ledger account for each posting entry.
8. Fill in the posting reference column in the general journal for each entry.

22.06 TASK: Prepare work sheet

PERFORMANCE OBJECTIVE: Given a blank work sheet, a list of accounts and their balances, and data for making basic adjusting entries (ending merchandise inventory, end of period balance of prepaid insurance, ending supplies inventory, bad debts expense, and depreciation expense), the student will properly calculate adjustments and complete the work sheet. All extended balances and the net income on the work sheet must be correct when compared with the instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms, concepts, and processes related to the preparation and completion of a work sheet.
2. Record general ledger account balances in the trial balance columns of the work sheet.
3. Prove the accuracy of the ledger by proving the equality of the trial balance debit and credit column totals.
4. Follow recognized procedures for locating errors that can cause trial balances to be out of balance.
5. Plan, calculate, and record the necessary adjustments in the adjustments columns of the work sheet.
6. Total and prove the equality of debits and credits in the adjustments columns.
7. Extend the work sheet trial balance and adjustments columns to the income statement and balance sheet columns.
8. Total income statement and balance sheet columns and calculate and enter the net income or loss on the appropriate line.
9. Prove and rule the income statement and balance sheet columns.

22.07 TASK: Prepare income statement

PERFORMANCE OBJECTIVE: Given the information contained in the Income Statement column of a completed work sheet and an appropriate multi-column statement form, the student will prepare an Income Statement for the business shown on the work sheet. All calculations must be performed properly and correctly and the presentation format must be made using an acceptable format.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms and concepts related to the preparation of an income statement.
2. Prepare the heading of an income statement.
3. Identify the information on a work sheet which will be used in an income statement.
4. Prepare the revenue section of an income statement and calculate net revenue.
5. Prepare the cost section of an income statement and calculate cost of goods sold.
6. Calculate gross profit.
7. Prepare and total the expense section of an income statement.
8. Calculate net income or loss and verify its accuracy by comparing it with the income or loss on a work sheet.
9. Complete and rule an income statement.

22.08 TASK: Prepare statement of owner's equity

PERFORMANCE OBJECTIVE: Given a completed work sheet and a multi-column statement form, the student will prepare an appropriate capital statement. All calculations must be performed properly and correctly and the presentation format must be made using an acceptable format.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms and concepts related to the preparation of a capital statement.
2. Prepare the heading of a capital statement.
3. Identify the beginning capital on a work sheet and record the amount on a capital statement.
4. Identify any increases to owner equity on a work sheet and record them on a capital statement.
5. Identify any decreases to owner equity on a work sheet and record them on a capital statement.
6. Calculate and record ending owner equity on a capital statement.
7. Complete and rule a capital statement.

22.09 TASK: Prepare balance sheets

PERFORMANCE OBJECTIVES: Given a 10-column completed worksheet and a completed Statement of Owner's Equity, the student will prepare a correct balance sheet for the end of the fiscal period.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of all terms related to preparing a balance sheet.
2. Prepare the heading of a balance sheet.
3. Demonstrate the ability to identify the accounts on the worksheet to be used on a balance sheet.
4. Demonstrate an understanding of the report form of a balance sheet.
5. Prepare the assets portion of the balance sheet, total and double rule.
6. Prepare the liability portion of the balance sheet and total.
7. Prepare the owners' equity portion of the balance sheet and total.
8. Total and double rule the liability and owner's equity portion of the balance sheet.
9. Demonstrate the ability to find and correct errors.

22.10 TASK: Journalize and post adjusting entries

PERFORMANCE OBJECTIVE: Given a completed worksheet and the necessary adjustments information, the student will record in general journal form the required adjusting entries and post the entries to the general ledger, balancing all accounts with instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms and concepts related to journalizing and posting adjusting entries.
2. Demonstrate an understanding of the need for making adjustments to specific accounts.
3. Demonstrate a knowledge of which accounts need to be adjusted.
4. Demonstrate the ability to calculate the adjustments.
5. Demonstrate the ability to journalize adjusting entries into the proper debit and credit columns.
6. Use a pencil footing to check the debits and credits of the adjustments entries.
7. Locate the accounts for posting the adjustments to the general ledger.
8. Record the date of the posting in the date column.
9. Post the adjusted amounts in the debit or credit column.

10. Demonstrate the ability to update the account balance in the appropriate balance column.
11. Record the reference in the post reference column of the account in the general ledger.
12. Record the reference in the post reference column of the general journal.
13. Prove the accuracy of the posting by totaling the debits and credits in the general ledger.
14. Demonstrate the ability to find and correct any errors in the journalizing or posting.

22.11 TASK: Journalize and post closing entries

PERFORMANCE OBJECTIVE: Given a completed worksheet, the student will refer to the data on the worksheet, write in general journal form the required closing entries, and post the entries to the general ledger, balancing with the instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate the knowledge of all terms and concepts related to closing entries.
2. Demonstrate an understanding of the purpose of closing the temporary accounts.
3. Demonstrate a knowledge of the four steps in the closing procedure.
4. Journalize the closing of the appropriate accounts by proceeding through the four closing steps.
5. Total and double rule the debit and credit columns, making sure they are in balance.
6. Locate the accounts for posting closing entries to the general ledger.
7. Record the correct posting date in the date column.
8. Post the closing amount in the correct column and clear the account.
9. Record the posting reference in the reference column of the general ledger account.
10. Record the posting reference in the reference column of the general journal.
11. Demonstrate the ability to find and correct any errors found in the journalizing or posting.

22.12 TASK: Prepare post-closing trial balance

PERFORMANCE OBJECTIVE: Given the general ledger at the end of the month after the adjusting and closing entries have been posted, the student will prepare a post-closing trial balance, balancing with instructor's key.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of the terms and concepts related to a post-closing trial balance.

2. Demonstrate a knowledge of the purpose of doing a post-closing trial balance.
3. Prepare the heading for a post-closing trial balance.
4. Record in order all remaining open accounts.
5. Total the debit and credit columns, balance, and double rule.
6. Demonstrate the ability to find and correct errors.

22.13 TASK: Prepare data for a general budget

PERFORMANCE OBJECTIVE: Given the previous year's income statement, balance sheet, budget reports, and projections for the coming year, the student will correctly prepare data for a general budget covering sales, production, administration, and finance by analyzing, projecting, and calculating the changes necessary to set up the budget for the coming year.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms and concepts related to budgeting.
2. Demonstrate an understanding of the need for and purpose of budgeting.
3. Demonstrate a knowledge of the effect of economic conditions on budgeting.
4. Differentiate between fixed costs and variable costs.
5. Define a flexible budget and explain its use.
6. Demonstrate the knowledge of how to establish standard costs and why they are used in budgeting.
7. Demonstrate the ability to calculate the data for a general budget.
8. Demonstrate the ability to prepare a general budget including managerial, operational, sales, production, overhead costs, and finance.

22.14 TASK: Interpret financial statements

PERFORMANCE OBJECTIVE: Given the financial statements for two years for a business, the student will analyze and interpret the information regarding the liquidity (solvency) of the business, its profitability, and the extent of leverage with which it operates, to the instructor's satisfaction.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms and concepts related to interpreting financial statements.
2. Demonstrate a knowledge of the following methods of measuring liquidity and what each indicates:
   a. Working Capital.

b. Current Ratio.
c. Receivables Turnover.
d. Finished Goods Turnover.

3. Demonstrate a knowledge of the methods of measuring profitability and what each indicates:
   a. Ratio of Net Sales to Plant and Equipment.
   b. Return on Total Assets.
   c. Return on Owners' Equity.
4. Demonstrate a knowledge of the methods of measuring leverage and what each indicates:
   a. Ratio of Liabilities to Owners' Equity.
   b. Times Interest Earned Ratio.
5. Demonstrate the ability to calculate the liquidity, the profitability, and the leverage of a business.

22.15 TASK: Perform accounting functions using an automated accounting system

PERFORMANCE OBJECTIVE: Given a microcomputer with which the student is familiar, appropriate manuals, program disks, and data for a small merchandising firm, the student will demonstrate, to the instructor's satisfaction, the ability to use an automated accounting system.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of terms and concepts related to an automated accounting system.
2. Demonstrate a knowledge of the special keys and commands in the accounting program.
3. Demonstrate the ability to set up a company's books on an automated accounting program.
   a. Key enter company information.
   b. Prepare input sheets for a chart of accounts, appropriately numbering the accounts to satisfy the requirements of the accounting program.
   c. Key enter the chart of accounts.
   d. Key in the appropriate account numbers in the integration table and classify the accounts.
   e. Display/print the chart of accounts and check for accuracy.
   f. Set up the general ledger module.
      1) Prepare journal entries input forms of the opening balances and total the sheets, verifying the equality of the debits and credits.
      2) Key enter the account numbers and their opening balances in the appropriate debit or credit columns, referencing them, and checking for accuracy.
      3) Display/print an opening balance report and check totals against the input sheet totals.
   g. Set up the accounts receivable module.

1) Create customer codes.
2) Complete input forms for customers.
3) Prepare input forms for customer opening balances and total them.
4) Key enter the customer list.
5) Key enter the customer opening balances.
6) Display/print customer list.
7) Display/print customer opening balances report.
8) Check print-outs with input sheets for accuracy.

h. Set up the accounts payable module.
1) Create vendor codes.
2) Complete input forms for creditors and all other payees.
3) Prepare input forms for vendor opening balances and total them.
4) Key enter the vendor list.
5) Key enter the vendor opening balances.
6) Display/print a vendor list.
7) Display/print the vendor opening balances report and check the total with the input sheet for accuracy.

i. Set up the inventory module.
1) Create inventory codes.
2) Prepare input forms for inventory.
3) Prepare input forms for inventory opening balances indicating the cost, the sale price of each item, and the quantity on hand.
4) Key enter the inventory list.
5) Key enter the inventory opening balances.
6) Display/print an inventory list.
7) Display/print an inventory opening balance report and check the total with the input sheet for accuracy.

4. Demonstrate the ability to update files by adding new files, making appropriate changes to current files, and deleting obsolete files.

5. Demonstrate the ability to perform daily transaction activities.

a. Determine the appropriate module for each type of transaction and sort the source documents by module as well as chronologically.

b. Analyze each transaction as to accounts involved and by debits and credits.

c. Prepare input forms for each of the following modules using the source documents previously sorted and analyzed.
1) New Vouchers Module:
a) Prepare new voucher input forms recording the transaction date, vendor code, voucher number, debit account number, and voucher amount.
b) Record whether there is a discount or a purchase tax.

c) Total the input sheets and make any corrections needed.

2) Cash Payments/Debit Memos Module:
   a) Prepare the cash payments/debit memos input forms recording the transaction date, vendor code, cash account number, amount of payment, and type of each transaction.
   b) Total the input sheets and make any corrections needed.
3) Sales Module:
   a) Prepare the sales on account input forms recording the transaction date, customer code, credit account number, invoice number, and amount.
   b) Record whether there is a discount or sales tax.
   c) Total the input sheets and make any corrections necessary.
4) Cash Receipts and Credit Memos Module:
   a) Prepare the cash receipts and credit memos input forms recording the transaction date, customer code, invoice number, transaction type, and amount to be applied on the account.
   b) Total the input sheets and make any corrections needed.
5) General Ledger Module:
   a) Prepare the general journal input forms recording the date, debit account number, reference, and amount, then the credit account number and amount.
   b) Total the input sheets and make any corrections necessary.

d. Key enter each module using the input sheets and check for accuracy.
e. Display/print the reports for accounts payable type transactions:
   1) new vouchers report.
   2) purchase orders/merchandise received.
   3) payments and debit memos report.
   4) check register.
   5) checks.
f. Display/print the reports for accounts receivable type transactions:
   1) sales report.
   2) invoices.
   3) cash receipts and credit memos report.
g. Display/print the general journal entries report.
h. Check all the print-out sheets for accuracy, then post the entries to the ledger.
i. Print a posting summary for each module

6. Demonstrate the ability to do period-end adjustments:

a. Prepare an input sheet of adjusting entries.
b. Key enter the adjusting entries in the general journal.
c. Display/print the journal entries report.
d. Display/print the general journal activities report.
e. Prepare a physical inventory count sheet.
f. Key enter the physical inventory count.
g. Display/print the inventory comparison sheet.

7. Demonstrate the ability to do period-end activities:
   a. Post the inventory adjustments.
   b. Post all modules to the general ledger.
   c. Display/print a general ledger activity report.
   d. Display/print an accounts receivable aged report.
   e. Display/print an accounts payable aged report.
   f. Display/print an inventory activity report.
   g. Display/print a trial balance.
   h. Display/print an income statement.
   i. Display/print a balance sheet.
   j. Close out the temporary accounts using year-end command.
   k. Display/print a post-closing trial balance.
   l. Do any necessary reversing entries to begin the new fiscal year.

22.16 TASK: Perform accounting functions using an automated spreadsheet system

PERFORMANCE OBJECTIVE: Given a microcomputer with which the student is familiar, appropriate manuals, a program disk for a familiar spreadsheet program, and data for each assignment, the student will demonstrate the ability to use the program for various accounting functions to the instructor's satisfaction.

ENABLING OBJECTIVES:

1. Demonstrate a knowledge of automated spreadsheet terms and concepts.
2. Demonstrate the ability to follow instructions in the program manual.
3. Demonstrate the ability to use spreadsheet commands.
4. Demonstrate the ability to save and retrieve a file.
5. Demonstrate the ability to move within a worksheet.
6. Demonstrate the ability to format a worksheet.
7. Demonstrate the ability to enter text, numbers, and formulas.
8. Demonstrate the ability to move and copy information within a worksheet.
9. Demonstrate the ability to insert and delete information, rows, and columns.
10. Demonstrate the ability to work with ranges and windows.

11. Demonstrate an ability to set up and use macros as they relate to accounting spreadsheets.
12. Demonstrate the ability to print hard copies of worksheets, including the formulas.
13. Demonstrate the ability to print headings on reports.
14. Demonstrate the ability to prepare a template for the following accounting reports to:
    a. produce a business expense report.
    b. find the percentage of profit.
    c. produce a working budget.
    d. do a bank reconciliation.
    e. compute averages on a report.
    f. compute payments on a loan.
    g. project the affect of an increase in sales.
    h. project the affect of an increase in production.
    i. create an income statement.
    j. create a balance sheet.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 23 - PERFORM TELECOMMUNICATIONS SPECIALTY ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 23 - PERFORM TELECOMMUNICATIONS SPECIALTY ACTIVITIES

23.0 PERFORM TELECOMMUNICATIONS SPECIALTY ACTIVITIES--The student will be able to:

- 23.01 Define telecommunications and understand the history of telecommunications
- 23.02 Demonstrate knowledge of basic telecommunication concepts in relation to technology, applications, and system components
- 23.03 Categorize terminal equipment according the four applications of voice, data, image, and text and demonstrate knowledge of their capabilities.
- 23.04 Compose and send electronic messages using appropriate format and composition
- 23.05 Discuss impact of local and wide area networks on the delivery of information
- 23.06 Identify business concerns such as procurement, accounting, security, and other concerns.
- 23.07 Understand the basic function of the telecommunications regulatory/policy process.
- 23.08 Identify and understand telecommunications applications and services.
- 23.09 Understand the human impact of telecommunications.

MODULE 23 - PERFORM TELECOMMUNICATIONS SPECIALTY ACTIVITIES

23.01 TASK: Define telecommunications and understand the history of telecommunications.

PERFORMANCE OBJECTIVE: Given the definition of telecommunications and the history, the student will be able to identify 90 percent of the questions relating to this area.

ENABLING OBJECTIVES:

1. Know the definition of telecommunications.
2. Identify the history and the needs that have shaped the telecommunications industry.

23.02 TASK: Demonstrate knowledge of basic telecommunication concepts in relation to technology, applications, and system components

PERFORMANCE OBJECTIVE: Given 10 telecommunications terms and specific telecommunications concepts, the student will problem solve 90 percent of the concepts.

ENABLING OBJECTIVES:

1. Understand the relationship between telecommunications technology, applications, and fundamental system components.
2. Describe the advantages and disadvantages of analog and digital electronic transmission forms.
3. Understand the characteristics of multiplexing and transmission channels.
4. Identify and describe applications of voice, data, image, and text.
5. Describe copper, satellite, microwave, and glass or plastic as they relate to transmission systems and forms.
6. Describe basic switching systems and capabilities.

23.03 TASK: Categorize terminal equipment according the four applications of voice, data, image, and text and demonstrate knowledge of their capabilities.

PERFORMANCE OBJECTIVE: Given five situations of the basic workings, functions, and applications of terminal equipment, the student will correctly explain and identify the basic workings, functions, and applications of terminal equipment and to introduce the current forms of terminal equipment.

ENABLING OBJECTIVES:

1. Define terminal equipment.
2. Identify the basic workings, functions, and applications of terminal equipment.
3. Identify forms of terminal equipment for voice, data, image, and text applications.
4. Analyze the cost-performance trade-offs of different kinds of terminal equipment.
5. Identify the limitations of integrated applications.

23.04 TASK: Compose and send electronic messages using appropriate format and composition

PERFORMANCE OBJECTIVE: Given three situations, the student will compose, format, and send three electronic messages meeting all elements on a checklist.

ENABLING OBJECTIVES:

1. Understand the difference between electronic mail and electronic messages.
2. Compose the message following rules of business writing.
3. Format the message in such a way that it is readable on the equipment being used.
4. Send the message.

23.05 TASK: Discuss impact of local and wide area networks on the delivery of information

PERFORMANCE OBJECTIVE: Given an essay question, the student will describe the impact of local and wide area networks on the delivery of information. The student will discuss each point on a list provided with 90 percent accuracy.

ENABLING OBJECTIVES:

1. Define local and wide area networks.
2. Understand when each might be used.
3. List the disadvantages of each.
4. List the advantages of each.
5. State the cost range of each.
6. Name vendors supplying each.

23.06 TASK: Identify business concerns such as procurement, accounting, security, and other concerns.

PERFORMANCE OBJECTIVE: Given essay questions, the student will identify business concerns in evaluating telecommunications networks. The student will discuss each point on a list provided with 90 percent accuracy.

ENABLING OBJECTIVES:

1. Understand telecommunications in terms of cost, performance, and availability.
2. Describe the levels of network security.

23.07 TASK: Understand the basic function of the telecommunications regulatory/policy process.

PERFORMANCE OBJECTIVE: Given a specific regulatory/policy problem, the student will present an argument for each side of the federal and local level of telecommunications regulations. Given another problem, the student will be able to identify the basic advantages and disadvantages of telecommunications regulations.

ENABLING OBJECTIVES:

1. Explain the role of the federal and state regulatory agencies.
2. Explain the effect of suppliers and users on telecommunications regulations and policies.
3. Identify basic advantages and disadvantages of telecommunications regulations.

23.08 TASK: Identify and understand telecommunications applications and services.

PERFORMANCE OBJECTIVE: Given specific situations, the student will identify the appropriate application and services in voice, data, image, and text with 90 percent accuracy.

ENABLING OBJECTIVES:

1. Identify examples of telecommunications applications and services in voice, data, image, and text.
2. Identify examples of hybrid applications.

23.09 TASK: Understand the human impact of telecommunications.

PERFORMANCE OBJECTIVE: Given specific situations, the student will understand the relationship between user expectations for quality in voice, data, image, and text applications and changes in telecommunications services. The student will discuss each point of user expectations with 90 percent accuracy.

ENABLING OBJECTIVES:

1. Understand how organizational structure and policy effect telecommunications services.
2. Describe the changes in international telecommunications and the impact on communications, commerce, and services.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 24 - PERFORM DATA PROCESSING SPECIALTY ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 24 - PERFORM DATA PROCESSING SPECIALTY ACTIVITIES

24.0 PERFORM DATA PROCESSING SPECIALTY ACTIVITIES--The student will be able to:

- 24.01 Demonstrate knowledge of data processing terms
- 24.02 Identify equipment associated with processing of data
- 24.03 Demonstrate knowledge of business-computer languages
- 24.04 Demonstrate knowledge of operating systems/languages
- 24.05 Prepare flow charts for business applications
- 24.06 Demonstrate trouble-shooting and diagnostic procedures

MODULE 24.0 - PERFORM DATA PROCESSING SPECIALTY ACTIVITIES

24.01 TASK: Demonstrate knowledge of data processing terms

PERFORMANCE OBJECTIVE: Given a list of data processing terms, the student will define the terms and classify each according to its area of use.

ENABLING OBJECTIVES:

1. Determine the terms used in word processing and give the definition and application.
2. Determine the terms used in database and give the definition and application.
3. Determine the terms used in spreadsheets and give the definition and application.
4. Determine the terms used in graphics and give the definition and application.
5. Determine the terms used in computer programming and give the definition and application.

24.02 TASK: Identify equipment associated with processing of data

PERFORMANCE OBJECTIVE: Given any data processing task, the student will determine the best type of equipment and software needed to complete the task or will explain the application for which any data processing equipment or software is designed.

ENABLING OBJECTIVES:

1. Determine the data processing task.

2. Classify the task as to its area of data processing: word processing, spreadsheets, graphing, programming, database.
3. Determine the software best suited for the job.
4. Determine the equipment best suited for the software and application.
5. Recognize differences in software and equipment.

24.03 TASK: Demonstrate knowledge of business-computer languages

PERFORMANCE OBJECTIVE: Given the attributes of several computer languages, the student will determine which of the languages is best suited to the needs of the application.

ENABLING OBJECTIVES:

1. Learn the attributes of the COBOL language and write a short program in that language.
2. Learn the attributes of the language C and write a short program in that language.
3. Learn the attributes of the BASIC language and write a short program in that language.
4. Learn the attributes of the Pascal language and write a short program in that language.
5. Learn the attributes of the FORTRAN language and write a short program in that language.
6. Learn the attributes of the RGBII language and write a short program in that language.
7. Ascertain the appropriate language for the desired application.

24.04 TASK: Demonstrate knowledge of operating systems/languages

PERFORMANCE OBJECTIVE: Given a computer or computer system, the student will manipulate files and perform floppy disk or hard disk operations on the system.

ENABLING OBJECTIVES:

1. Copy files or rename files.
2. Create or delete files.
3. Merge or search files.
4. Transfer or convert files.
5. Save files on floppy or hard disk.
6. Display memory allocations.
7. Read or change what is in memory locations.
8. Write and run a program on an operating system.
9. Obtain hard copy of the program at printer.
10. Format or initialize floppy disks.

11. Store or remove information on hard disk.
12. Create and use subdirectories on hard disk.

24.05 TASK: Prepare flow charts for business applications

PERFORMANCE OBJECTIVE: Given a business application, the student will trace the pattern of work task will follow to completion.

ENABLING OBJECTIVES:

1. Determine the task to be completed.
2. Classify in one of business applications: word processing, spreadsheets, database, graphing, or programming.
3. Complete necessary paper work to request completion of task.
4. Assign task to appropriate department for completion.
5. Follow up to clarify assignment or ascertain completion.

24.06 TASK: Demonstrate trouble-shooting and diagnostic procedures

PERFORMANCE OBJECTIVE: Given a hardware related problem, student will remedy the problem or will determine if other help is necessary.

ENABLING OBJECTIVES:

1. Classify if system is mainframe, mini, micro, or network.
2. Define CPU, Monitor, keyboard, and network and show how they interface.
3. Determine if machine is in operating condition.
4. Determine if problem is with software or hardware by using software on a different machine.
5. Find commonalities between two like machines and make necessary changes to disabled machine.
6. Ascertain if cables or connectors are at fault by switching with working machine.
7. Try to reboot the software again.
8. Read operating manual for advice.
9. Call for professional help.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 25 - PERFORM NETWORKING SPECIALTY ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 25 - NETWORKING SPECIALTY ACTIVITIES

25.0 NETWORKING SPECIALTY ACTIVITIES--The student will be able to:

- 25.01 Introduce students to the basic networking concepts and terms.
- 25.02 Provide a definition of advantages and disadvantages of local area networks
- 25.03 Provide comparisons of topologies and protocols available for local area networks
- 25.04 Install local area network hardware
- 25.05 Generate and maintain the operating system
- 25.06 Set up file servers, user specifications, and printers
- 25.07 Provide system administrator managements with day-to-day maintenance
- 25.08 Identify standards and their importance and implications
- 25.09 Introduce bridges and gateways
- 25.10 Install application software on a network

MODULE 25 - NETWORKING SPECIALTY ACTIVITIES

25.01 TASK: Introduce students to the basic networking concepts and terms.

PERFORMANCE OBJECTIVE: Given 20 networking terms, the student will on an objective matching test correctly identify 90 percent of the terms.

ENABLING OBJECTIVE:

1. Define requirements for a local area network as well as distinguish between local and wide area networks.

25.02 TASK: Provide a definition of advantages and disadvantages of local area networks.

PERFORMANCE OBJECTIVE: Given five situations for local area networks, the student will demonstrate knowledge of the advantages and disadvantages with 90 percent accuracy.

ENABLING OBJECTIVE:

1. Identify the advantages and disadvantages of local area networks.

25.03 TASK: Provide comparisons of topologies and protocols available for local area networks.

PERFORMANCE OBJECTIVE: Given a specific situation, the student will be able to identify the appropriate protocols and topology with 100 percent accuracy.

ENABLING OBJECTIVE:

1. Compare standards and topologies and write local area network procedures.

25.04 TASK: Install local area network hardware.

PERFORMANCE OBJECTIVE: Given a specific situation, the student will be able to identify correctly the steps for installation of the local area network.

ENABLING OBJECTIVE:

1. Set up and install the hardware and software for a local area network.

25.05 TASK: Generate and maintain the operating system.

PERFORMANCE OBJECTIVE: Given a written test, the student will establish server hardware, boot the server, run the server utility, run the install utility, and create an AUTOEXE.BAT file for booting the server with 100 percent accuracy.

ENABLING OBJECTIVES:

1. Install disk drivers and network interface cards for preparing hardware in the server.
2. Run the file server vendor's setup program along with procedures to define drive types, boot sequence, parallel and serial port configuration, monitor configuration, and memory.
3. Run the server utility to establish server name, to set the internal network number, to load the disk driver module, to load the LAN driver module, to load other driver modules, and to assign the network number.
4. Run the install utility to create the disk partition tables, establish mirrored drives, create and mount volumes, copy system and utility files to the server, and create files for the DOS boot diskette.
5. Create the AUTOEXE.BAT file for boot diskette.

25.06 TASK: Set up file servers, user specifications, and printers.

PERFORMANCE OBJECTIVE: Given a specific number of file servers, user specifications, and printers, the student will be able to identify correctly and list the steps for local area network setup.

ENABLING OBJECTIVES:

1. Set up file servers, user specifications and requirements, LAN accessories, and printers.

25.07 TASK: Provide system administrator managements with day-to-day maintenance.

PERFORMANCE OBJECTIVE: Given specific situations, the student will be able to maintain the system by backing up programs and files and by correctly using troubleshooting diagnostic software.

ENABLING OBJECTIVES:

1. Backup network data programs and files and maintain system.
2. Successfully apply and evaluate troubleshooting diagnostics software to computer system operations.

25.08 TASK: Identify standards and their importance and implications.

PERFORMANCE OBJECTIVE: Given specific standards, the student will be able to list the implications and identify the importance of the standards.

ENABLING OBJECTIVES:

1. Correctly identify the standards.
2. Identify the implications of the standards.
3. Describe the importance of the standards.

25.09 TASK: Introduce bridges and gateways.

PERFORMANCE OBJECTIVE: Given bridging and gateway terms, the student will on an objective matching test correctly identify 95 percent of the terms.

ENABLING OBJECTIVES:

1. Define bridging.
2. Identify the types of bridges.
3. Apply the appropriate bridge to the appropriate situation.
4. Define gateways.
5. Identify the types of gateways.

25.10 TASK: Install application software on a network.

PERFORMANCE OBJECTIVE: Given a specific situation for network use, the student will be able to install application software correctly on the network.
ENABLING OBJECTIVE:

1. Install application software on a network so that the software operates successfully.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 26 - PERFORM RECORDS MANAGEMENT SPECIALTY ACTIVITIES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 26 - PERFORM RECORDS MANAGEMENT ACTIVITIES

26.0 PERFORM RECORDS MANAGEMENT ACTIVITIES--The student will be able to:

- 26.01 File records correctly using alphabetic, numeric, subject, geographic, and chronological methods as learned in the filing unit
- 26.02 Learn terminology as it applies to records management
- 26.03 Describe methods of protecting vital records
- 26.04 Describe appropriate actions for the retention and disposal of records
- 26.05 Compare characteristics of centralized and decentralized filing systems
- 26.06 Classify records into vital, useful, and nonessential categories
- 26.07 Compare manual with electrical/automated filing systems
- 26.08 Describe security procedures

MODULE 26 - PERFORM RECORDS MANAGEMENT ACTIVITIES

26.01 TASK: File records correctly using alphabetic, numeric, subject, geographic, and chronological methods as learned in the filing unit

PERFORMANCE OBJECTIVE: Given material to file, the student will determine which filing system is being used and follow the appropriate steps to file accordingly.

ENABLING OBJECTIVES:

1. Determine correct indexing order for various individual and company names to be filed using an alphabetic, numeric, subject, geographic, or chronological method.
2. File accordingly in order.

26.02 TASK: Learn terminology as it applies to records management

PERFORMANCE OBJECTIVE: Given 50 terms and definitions, the student will be able to match 48 of the 50 terms with their definitions.

ENABLING OBJECTIVES:

1. Learn records management terms.
2. Match terms to definitions.

26.03 TASK: Describe methods of protecting vital records

PERFORMANCE OBJECTIVE: Given a set of records to maintain, the student will know the methods of setting up, maintaining, and charging out vital records.

ENABLING OBJECTIVES:

1. Describe acceptable procedures for charge-out and follow-up of records.
2. Identify advantages of color coding files.
3. Explain the need for an inventory and analysis.

26.04 TASK: Describe appropriate actions for the retention and disposal of records

PERFORMANCE OBJECTIVE: Given a set of records to maintain, the student will know the retention and disposal guidelines for such records.

ENABLING OBJECTIVES:

1. Explain the need for a retention schedule and the different record classifications within an organization.
2. Determine methods of destroying records which have been identified for destruction.

26.05 TASK: Compare characteristics of centralized and decentralized filing systems

PERFORMANCE OBJECTIVE: Given the definitions of centralized and decentralized filing systems, the student will determine which method is being used by their organization or will determine which filing method will work best for their system.

ENABLING OBJECTIVES:

1. Explain the difference between centralized and decentralized filing systems.
2. Explain the benefits of using either system.

26.06 TASK: Classify records into vital, useful, and nonessential categories

PERFORMANCE OBJECTIVE: Given a set of records to maintain, the student will classify those that are vital, useful, or nonessential for retention purposes.

ENABLING OBJECTIVES:

1. Explain the difference between vital, useful, and nonessential records.
2. Know where these different types of records are stored.
3. Know the retention or destruction period of such records.

26.07 TASK: Compare manual with electronic/automated filing systems.

PERFORMANCE OBJECTIVE: Given a set of records to maintain, the student will determine whether a manual system or an electronic/automated system is needed or a combination of both.

ENABLING OBJECTIVES:

1. Define types of paper documents and the volume now and in the future.
2. Define types of microimage documents.
   a. microfilm.
   b. microfiche.
   c. aperture cards.
3. Define electronic media storage provisions for records.
4. Define the equipment available and the equipment required.
   a. Define the difference between mechanized systems.
      1. Mobile shelving
      2. Motorized (or power-driven) rotary storage
   b. Define the types of data/word processing computerized systems used.
      1. Mainframe
      2. Minicomputer
      3. Microcomputer
      4. Personal computer
5. Define the physical form of records entering the system, and the form of records desired as output of the system.
6. Identify the activity of records (how often used and how often the information on records changes).
7. Identify the speed and accuracy expected for records retrieval.
   a. Identify if indexing or coding is done for easy retrieval.
8. Know the cost of the machine system compared with benefits expected from its use.
9. Know if telecommunications is a part of the system.
   a. Know about and how to use local area network (LAN).
   b. Know about and how to use electronic mail.

c. Know about and how to use electronic funds transfer systems (EFTS).
d. Know about and how to use voice mail.

26.08 TASK: Describe security procedures

PERFORMANCE OBJECTIVE: Determine what security measures will be taken to protect all records.
ENABLING OBJECTIVES:

1. Protect paper records.
2. Protect microimaged records.
3. Protect electronic records.
4. Protect vital records.
5. Protect archives.

IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

MODULE 27 - COMPUTER GRAPHICS DESIGN PRINCIPLES

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IDAHO PROGRAM STANDARDS FOR BUSINESS SYSTEMS SPECIALIST

TASK LISTING

MODULE 27 - COMPUTER GRAPHICS DESIGN PRINCIPLES

27.0 COMPUTER GRAPHICS DESIGN PRINCIPLES ACTIVITIES--The student will be able to:

- 27.01 Demonstrate knowledge of the basics of the design process in graphics
- 27.02 Analyze previous and current industry techniques in graphic design
- 27.03 Determine effective strategies for graphic design
- 27.04 Utilize creative techniques to design simple graphic elements

Module 27 - COMPUTER GRAPHICS DESIGN PRINCIPLES

27.01 TASK: Demonstrate knowledge of the basics of the design process in graphics.

PERFORMANCE OBJECTIVE: Given a written test, the student will correctly answer 90 percent of the questions relating to the design process in graphics.

ENABLING OBJECTIVES:

1. Logically discuss the impact of the computer in the graphics industry.
2. Define terms associated with type, type specifications, and the printing industry.

27.02 TASK: Analyze previous and current industry techniques in graphic design.

PERFORMANCE OBJECTIVE: Given a description of current and previous industry graphic design techniques, the student will analyze and compare the techniques to the satisfaction of the customer.

ENABLING OBJECTIVES:

1. Analyze graphic design techniques.
2. Compare current and previous graphic design techniques.

27.03 TASK: Determine effective strategies for graphic design.

PERFORMANCE OBJECTIVE: Given a design problem, the student will determine the most effective means of solving the problem to the satisfaction of the customer.

ENABLING OBJECTIVES:

1. Analyze the use of graphic and character elements in the composition of a graphic design.
2. Select appropriate layouts for specific types of graphic elements.

27.04 TASK: Utilize creative techniques to design simple graphic elements.

PERFORMANCE OBJECTIVE: Given a design problem, the student will design, product, and sell a graphic element to the satisfaction of the customer.

ENABLING OBJECTIVE:

1. Successfully design, produce, and "sell" a graphic image.